subs
tribe
©

# LIGHTNING CASE STUDIES (06/10/20)

## Building a successful handover process from Sales to Customer Success at GoCardless

**Alix Fenoll-Wattinne**
B2B Saas Customer Success Leader

**The Challenge:**
The transition from Sales to Customer Success is a **critical moment in the customer journey**, don’t miss it!

*When*: contract signed, the account needs to be handed over from the Sales Executive to the CSM

**Pains we had:**

- Lack of collaboration between the Sales team and Customer Success team: 2 siloed teams
- Lack of communication from Sales to CS about the customer’s expectations
- Lack of visibility for the customer about the next steps

**Results**

- Poor customer experience
- Poor product adoption
- Company’s reputation damaged
- Missed revenue (retention & upsell)

**How to create a successful handover process between Sales and Customer Success ?**

## The Plan

**Building a joint handover process between Sales and Customer Success: steps we created at GoCardless**

### Pre-Sales

- → AE introduces the client to Customer Success at GoCardless

### Contract signed

- → CSM is automatically assigned a new account in Salesforce
- → CSM is automatically notified of a new account via email
- → AE logs all the information about the account in Salesforce

### Sales <> CS internal handover

- → AE & CSM review key information logged in Salesforce *(contract value, renewal date, stakeholders, goals...)*
- → AE sends intro email to client with next steps & team responsibilities moving forward

### CSM introduced to client

- → CSM follows up with a kick-off call/email to start with onboarding

## Impact: a process mutually beneficial for AEs and CSMs

**Metrics tracked and results:**

*Operations*

- Reduction of time to hand over a client from 6 weeks to 2 weeks
- Number of Success Plan completed in first 3 months: 100%

*Revenue*

- Churn in first 9 months: 0%
- Increase number of revenue opportunities identified in first 12 months (expansion & upsell)

*Advocacy*

- Increase number of customer stories in first 12 months
- NPS (new customers): 70

**Results & learnings**

*"The seeds of churn are planted early" (Lincoln Murphy)*

| 'Dos' | 'Don'ts' |
|---|---|
| ✅ Communicate about the process internally<br>✅ Get team members and leadership buy-in in the process<br>✅ Educate about Customer Success internally & externally<br>✅ Make sure clients' goals have been captured<br>✅ Always put yourself in the customer's shoes | ❌ Use a case-by-case scenario for assignment<br>❌ Make assumptions (customer needs and engagement)<br>❌ Wait for customer to reach out<br>❌ Make it a Customer Success topic only |