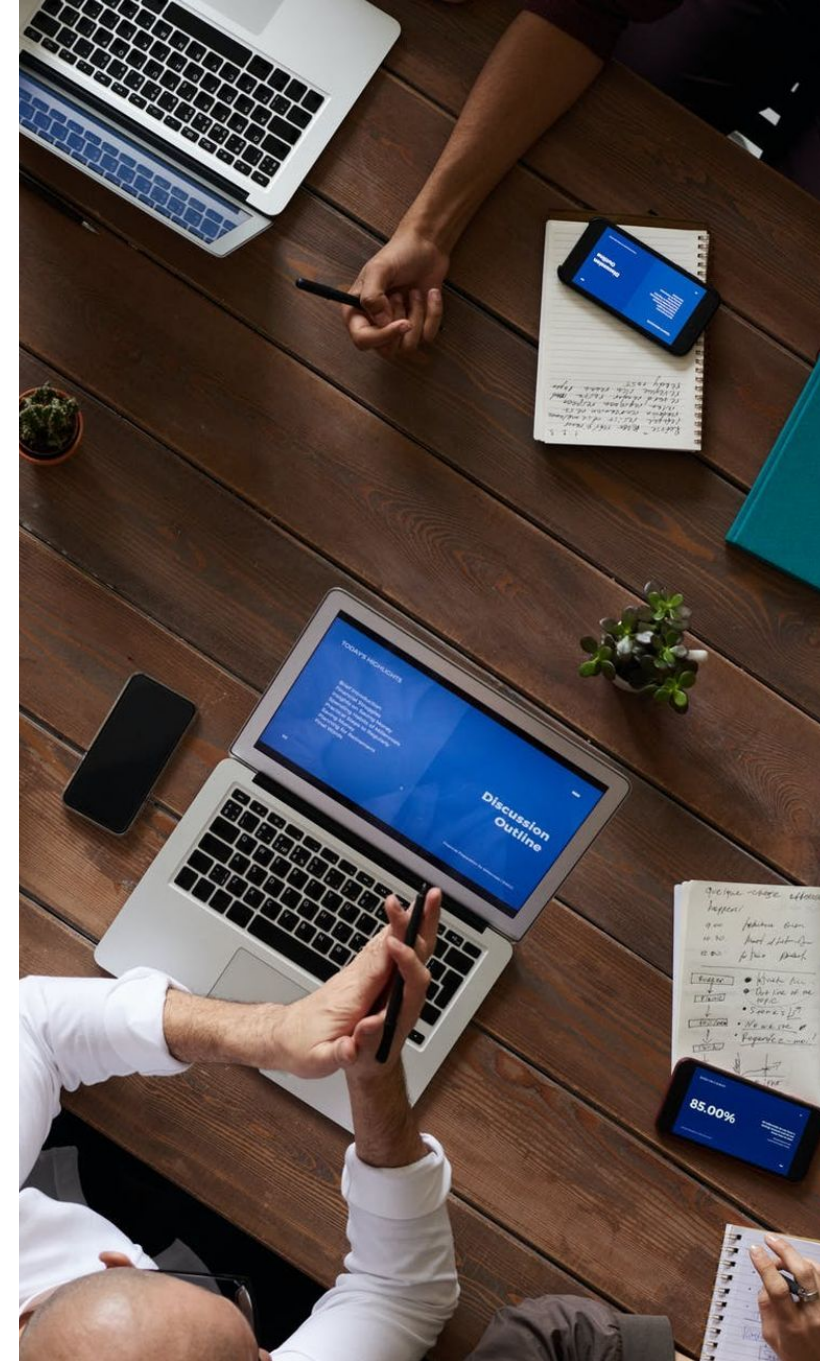# Lessons Learned in CS Operations

SHAPING THE FUTURE OF CUSTOMER SUCCESS
FEB 26, 2025

Hosted by: Kate Griffin - VP of Delivery Services
Moderator: Grace Tester - Sr. Manager, Strategic Client Development

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HOUSEKEEPING

- *We'll record and share the presentation*

- *Lines are muted, so please put your questions in chat*

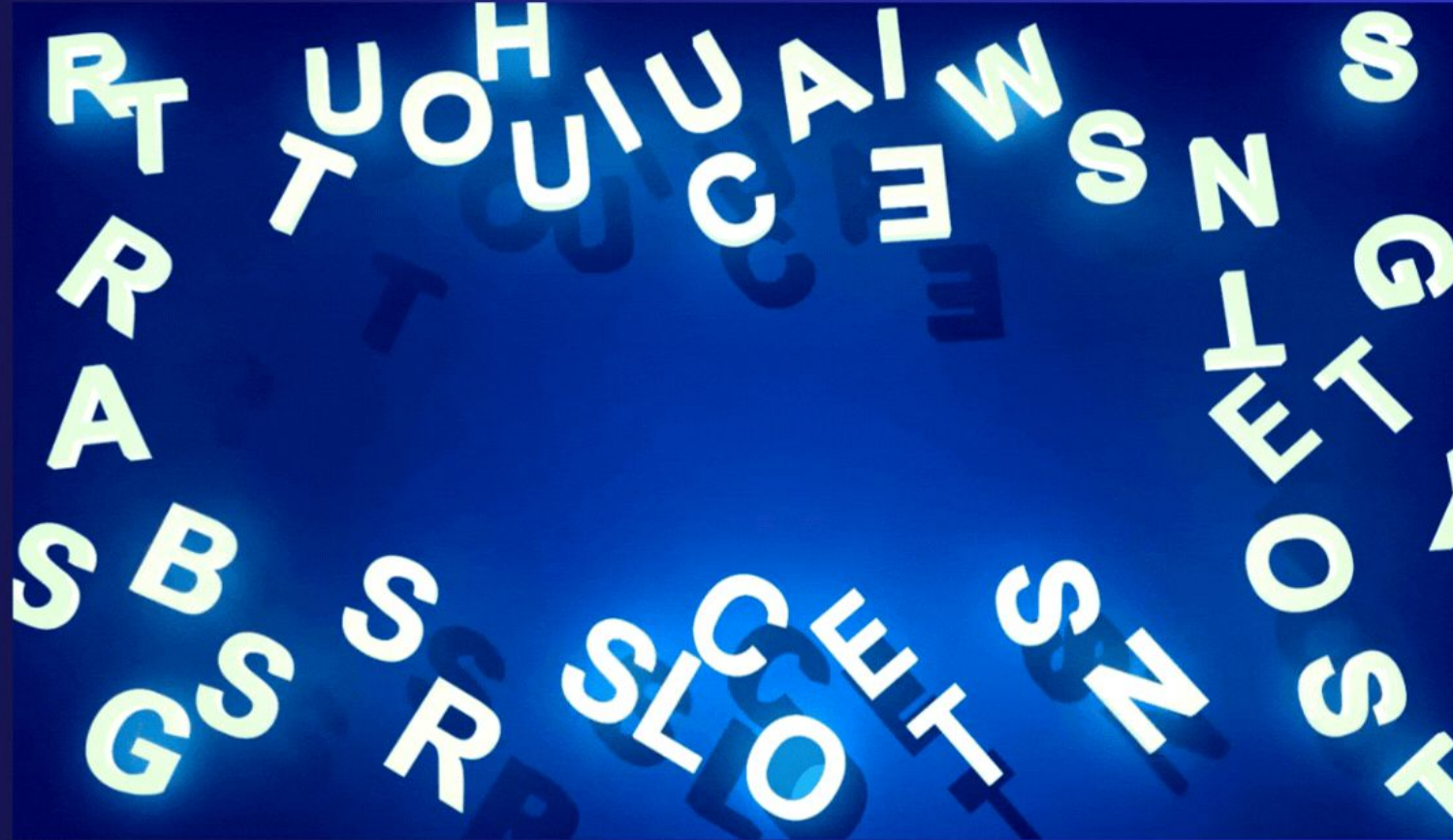- *Look for an invite to register for our next webinar, coming soon!*

![nCloud Integrators logo]

Session Agenda

- CS Operations: Setting the Stage

- Introduction of Our Panel

- Panel Q&A

- Audience Questions

- Wrap Up

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CS Operations

Quick Activity

Describe Customer Success Operations in 3 words or less! Drop your response in the chat.

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"*CS operations is the oft-invisible force that* **removes friction points, facilitates scalability, and elevates customer centricity** *across the entire organization. When CS Ops is successful, companies can* <u>build enduring customer relationships and accelerate growth</u>."

Everything You Need to Know About CS Ops, Intercom
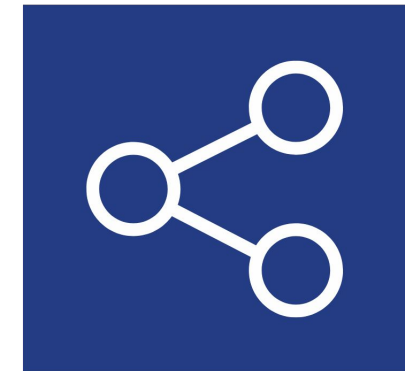
CS Operations Foundation

Data & Metrics

Ensure **data alignment and integration** to support the overall CS strategy.

Leverage robust **data analysis** to drive actionable insights and informed decision-making.

Track **critical KPIs** such as Time-to-Value, NRR, GRR, and CSAT

CS Operations Foundation

Process & Workflows

Align internal processes with key customer lifecycle stages (onboarding, adoption, renewal) for clarity and consistency.

Optimize workflows to boost team efficiency, enhance customer experiences and drive revenue growth.

Automate routine tasks to free up time for strategic, high-touch interactions

CS Operations Foundation

Technology Enablement

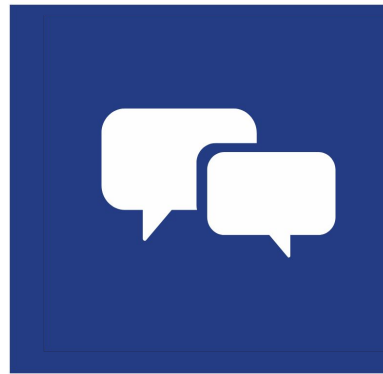Deploy **essential tools and technologies** to support the CS team effectively.

Integrate **systems across CS, Sales, and Support teams** for seamless communication and alignment.

CS Operations Foundation

Cross-Functional Alignment

Collaborate with Sales, Marketing, and Product teams to deliver a **unified customer experience**.

Establish robust **feedback loops** and shared goals to drive aligned, strategic initiatives.

CS Ops Persona   Motto: "Efficiency Fuels Success"

Traits

- **Analytical Thinker** – Loves dashboards, reporting, and digging into trends.
- **Process Architect** – Designs workflows that reduce friction and improve scalability.
- **Tech-Savvy** – Masters of Gainsight, Planhat, Totango, or other CS tools.
- **Problem-Solver** – Fixes inefficiencies, automates tasks, and aligns CS with company goals.
- **Strategic Collaborator** – Works cross-functionally with RevOps, Product, and Sales.
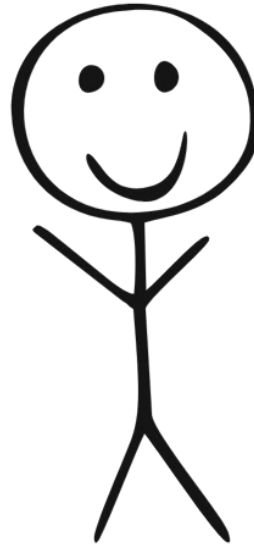
Superpowers & Skills

- **Automation Wizard:** Creates playbooks, workflows, and alerts to keep CS proactive.
- **Data Guru:** Tracks customer health, churn risk, and adoption trends.
- **Scalability Expert:** Ensures processes work at 100 or 10,000 customers.
- **Connector:** Bridges gaps between CS, Sales, and Product for a seamless customer journey.

Biggest Challenges

- **Tech Stack Overload** – Balancing multiple tools without overwhelming the team.
- **Data Silos** – Getting teams aligned on a **single source of truth**.
- **Balancing Standardization & Personalization** – Ensuring efficiency while allowing flexibility for high-touch accounts

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Where Are You in the CS Ops Journey?

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Startup	Scaling	Mature

Startup
- CS Ops is informal or nonexistent.
- Manual, ad-hoc processes (spreadsheets, basic reporting).
- No centralized system; data is scattered.
- Focus on firefighting vs. proactive management.

Scaling
- CS Ops has dedicated ownership.
- Customer data is centralized in a CS platform.
- Automation supports workflows and communications.
- Playbooks ensure consistency.

Mature
- CS Ops is strategic, influencing revenue & customer experience.
- AI-driven analytics optimize retention & expansion.
- Fully automated customer workflows.
- CS Ops drives long-term customer success.

Panel Introduction

Petrina Holoszyc
Director of CS Strategy & Operations, UserTesting
New York, NY

- Tell us about your role.

- What was your pathway to operations?

- How does your organization define Customer Success Operations?

Let's Connect on LinkedIn

Panel Q&A

Current Initiatives

What's a key CS Ops initiative you're working on, and what problem are you trying to solving?

Driving Adoption & Change

How should CS Ops support adoption and change management for CS strategy and initiatives?

Cross-Team Collaboration

In the work that you do, how do you ensure alignment and drive collaboration across teams?
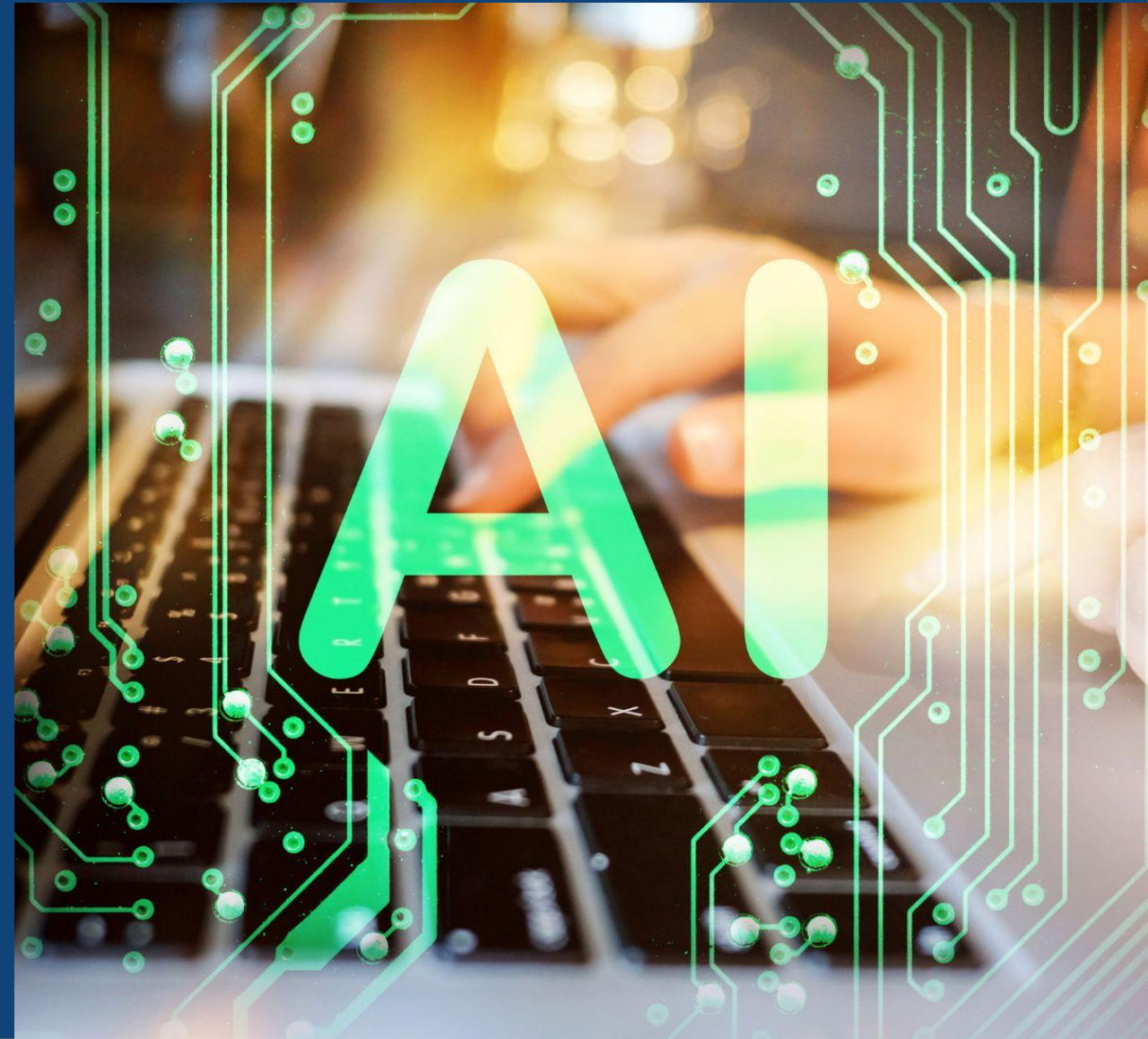
Measuring Success

How do you define success for your initiatives, and what KPIs matter most?

AI in CS Ops

How do you see AI evolving & driving CS Ops over the next 3-5 years? What tools are you using today?

CS Ops Resources

CS Ops Resources: Our Suggested Playlist

LinkedIn Influencers & Groups

- Maria Skobe-Pilley
- Kate Peter
- Erika Villarreal
- Shari Srebnick
- Greg Daines
- Jay Nathan
- Daphne Costa Lopes

LinkedIn Groups

- The CS Forum
- All in CS
- Operational Excellence

Email Newsletters & Podcasts

- Weekly Newsletter -
- CS Community -
- CS Thought Leader
- [Un] Churned - www.update.ai
- This is Growth - Sign up via Daphne Costa Lopes
- This is Growth Newsletter

Audience Questions

Contact

GRACE TESTER- NCLOUD INTEGRATORS
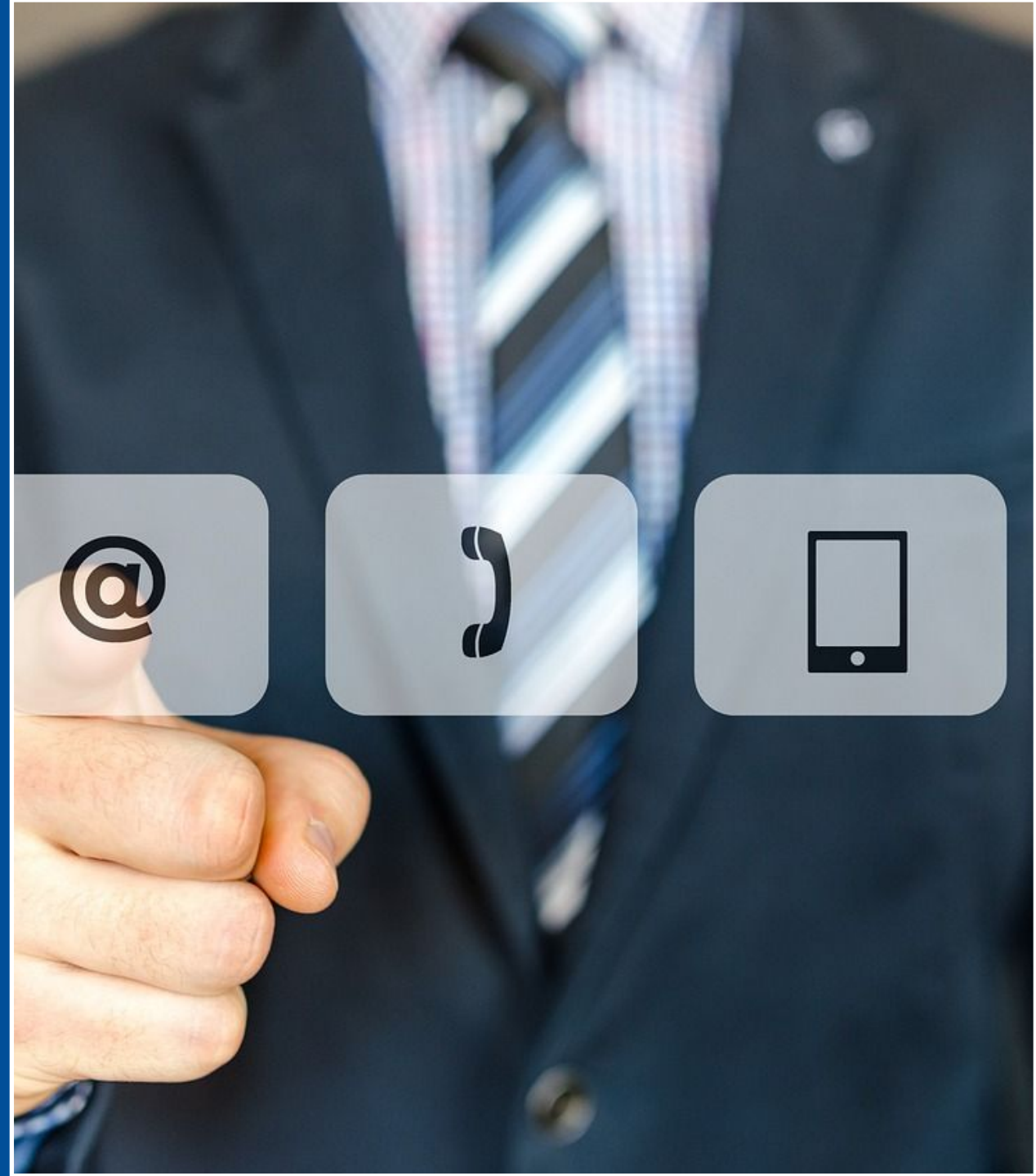
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