

FROM ACQUISITION TO ACTION: AVEVA's Strategic CSM Evolution

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CORPORATE OVERVIEW



OVERVIEW

In the midst of transitioning from private to public ownership following its acquisition by Schneider Electric, AVEVA, a global leader in industrial software, faced a pivotal moment. With the recent acquisition of OSIsoft under its umbrella, this evolution brought about significant change, particularly for Glenn Hummel's strong performing, strategic CSM team.

Their aim? To foster a more comprehensive, strategic, and growth-focused approach that would broaden the CSMs strategic consultative muscles, foster cross-functional collaboration across global business units, and drive business and revenue growth for both AVEVA and its customers.

CONSULTING FUN FACTS

Direct Client: Glenn Hummel, Director Customer Success, Global Accounts

Package: CUSTOMIZER PACKAGE - Consulting

Engagement Term: 4 months

Consulting Type:

1. **Consulting Sessions**
 - Bi-Weekly
2. **Strategic Focus:**
 - Upsell/Cross-sell/Expansion
 - ADKAR Change Management
 - i. Internal implementation of the new strategies

C.S.A.T Categories:

- 100% of Charter
- 20% of Strategy

CLIENT BACKGROUND

Company: AVEVA, subsidiary of Schneider Electric

Size: 6500 Employee

Valuation: \$11.69B

Investor Round: Private to Public M&A by Schneider Electric

Founded: 1967

Location: Cambridge, United Kingdom

Industry: SaaS, Industrial Software, Enterprise Software, Engineering IT Software, Industrial Manufacturing, Science and Engineering, Data Mining, AI

About: AVEVA has been named one of the world's most innovative companies. They are a global leader in industrial software that drives digital transformation for industrial organizations managing complex operational processes. AVEVA connects the power of information and artificial intelligence (AI) with human insight to enable precise decision-making that helps industries to boost operational delivery and sustainability for over 20,000 enterprises in over 100 countries. Its solutions include digital transformation, engineering, operations, performance, subscription options and cloud services

Learn More at: <https://www.aveva.com/>



In a nutshell, Dana's a superwoman in the field of customer success. She is truly a catalyst for change. Her expertise is undeniable. We focused on growth strategies around cross sell upsell and expansion. We incorporated elements of a change management strategy to ensure that the plans we developed would be successfully rolled out.

It led to a 10X growth in CSM discovered revenue, a 2X increase in CSQs, a 20% increase in my own team's headcount and promotions...Dana was instrumental in helping us devise the strategy that put all these wins in motion. Engaging with Dana Soza means setting yourself and your business up for undeniable success.

Glenn Hummel, Director Customer Success, Global Accounts,
AVEVA, a subsidiary of Schneider Electric

Challenge

Originating from OSIsoft, the CSM team underwent a significant transition when OSIsoft was acquired by AVEVA, then shortly thereafter AVEVA was acquired as a subsidiary of Schneider Electric. This series of acquisitions introduced several challenges for the entire Customer Success team.

1st, the CSMs, accustomed to specific solutions, had to adapt to a broader portfolio under AVEVA's ownership.

2nd, Glenn wanted to demonstrate his team's excellence, so a stronger emphasis on the growth and expansion of his team's base skills was required, necessitating a change in their approach. It was important to differentiate between the Global Strategic Account CSMs and show their importance to the company and the Regional CSMs who managed less strategic accounts. So with Glenn and his team at the top of the engagement pyramid, we started there, with plans for the other teams to follow suit later.

3rd, transitioning the CSMs technical and product-centric focus to a more strategic and customer-centric one required a deeper understanding of their customer's various industries and businesses.

Lastly, building effective cross-functional collaborations across a larger, global organization that spanned multiple continents, business units, and teams posed additional challenges, demanding enhanced communication and relationship-building skills.

Solution

Working side-by-side with Glenn, the Director of Customer Success for Global Accounts, to create a comprehensive solution that would drive transformative change.

1st, we orchestrated Glenn's creation of a well-defined CSM Charter—a strategic roadmap to guide their CSM team towards customer-centricity. This Charter outlined their mission, established key performance indicators (KPIs), assessed and mitigated potential risks, identified crucial activities, and defined key internal dependencies from functions across other regions and business units.

2nd, to encourage cross-functional collaboration globally, and to develop strong partnerships with his new counterparts globally, Glenn validated these dependencies with those other teams' leaders, as part of the change management process.

3rd, a detailed Expansion Playbook process and structure was crafted to fortify the team's capability in upselling and cross-selling. This playbook would not only be leveraged as a tool to strengthen the CSMs knowledge of AVEVA's broad solution portfolio, but also provided a proven structure for executing expansion strategies.

Lastly, as part of the ADKAR change management process, we facilitated the design of a pilot program and project plan for the Global CSM Director to follow. This allowed him a proven process to test and iterate on the new Charter and Expansion Playbook engagements, with the goal of rolling out to other parts of AVEVA.

By meticulously planning and executing each stage of this process, we increased the value to AVEVA's customers, and created a standardized and exceptional experience for them, while simultaneously increasing AVEVA's revenue. It also provided smooth transitions internally, fostered stronger global relationships, and put Glenn and his Global Strategic Team at the forefront of the transformation. empowered Glenn to lead the change, both with his team and the wider global AVEVA organization with confidence.

Results

1. **C.S.A.T. Growth-Engine Indicators:**

- **C.S.A.T. Growth-Engine Maturity:** Increased 2X in 6-months
- **Expansion:** 57% of CSQs converted to Closed Won

2. **Customer Success Growth Indicators:**

- **Revenue:** 10x increase in CSM-discovered Revenue
- **Expansion:** 2X increase in number of CSQs

3. **Other Growth Indicators:**

- **Headcount:** 20% Increase in 2 years, with expectations of additional headcount this year
- **Promotions/Career Growth:** Direct client promoted within 1 year. 2 CSMs on the team were promoted up a level in that same timeframe.

4. **Additional Value**

ROI: 10X+ return on investment within 1 year

Custom Deliverables

1. Charter: All - **CSM Charter**
2. Strategy: Partial Focus Area - **Expansion Playbook (upsell, cross-sell)**
3. C.S.A.T. Add-On - **Change Management Project & Comm. Plan**