

FUELING GROWTH: Journey to Market Leadership with Private Equity Backing

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CORPORATE OVERVIEW



OVERVIEW

This leading provider of cutting-edge utility construction software solutions has grown its revenue and client base exponentially over the last few years. However, internal processes and customer success assets created for the CS team have not been agreed upon collectively and, therefore, not fully adopted. This has led to some churn and an inconsistent customer experience.

Their aim? To scale their CS organization from its fast-growing startup roots into a formidable, customer-success-as-a-growth-engine powerhouse with a consistent customer experience to propel them toward competitive prowess in the market.

CLIENT BACKGROUND

Company: A high-growth SaaS software development leader serving the Utility Construction Management industry

Employee Count: 80 employees

Size: \$1-\$10M

Investor Round: Private Equity M&A Investment

Industry: Software development, Field Services Software, SaaS for Construction Project Management

CONSULTING FUN FACTS

Direct Client: Rob Hansen, SVP of Customer Success

Package: CUSTOMIZER PACKAGE - Contractor

Engagement Term: 6 months

Consulting Type:

- Contractor
 - 25 hours/week
 - Head of Customer Success Operations - Fractional Leader
- Strategic Focus:
 - Achieve next stage of growth for investment
 - ADKAR Change Management
 - Implement and enact the change internally

C.S.A.T Growth Engine Categories:

- 100% of Charter
- 80% of Strategy
- 60% of Analytics
- 80% of Talent



"As Senior Executives we often wonder, "How do we stack up to the competition?". Dana's C.S.A.T. Growth-Engine Tool benchmarked and validated that we were ahead of the pack. That was great news, and we wanted more. So, as our fractional Senior Global Director, Customer Success, Outcomes & Growth, her directive was to help strategize, design, and implement scalable solutions to elevate our customer success group to best-in-class status.

I appreciate everything Dana did for us, and highly recommend her as a customer success leader and fractional SME, as well as for her ability to drive positive outcomes, manage change, and effectively support business growth."

Rob Hansen,
SVP, of Customer Success, High Growth Utility Construction Co.

Challenge

The customer success team encountered challenges as they aimed to scale their operations.

Initially, the CS Team relied on project-based methodologies primarily focused on software setup for construction projects, supplemented with essential customer success tasks. While effective initially, this broad approach became unsustainable due to the company's rapid growth trajectory.

Furthermore, the team's unwavering dedication to serving customers in this way posed dual challenges. Firstly, their fondness for multifaceted responsibilities raised concerns about their readiness to embrace more specialized roles. Secondly, bandwidth constraints hindered adherence to the current segmentation and engagement strategy.

Additionally, the existing employee onboarding program lacked comprehensive training in customer success principles, with a stronger focus on technical aspects. Moreover, their consensus-driven culture, though a strength, sometimes slowed down the decision-making processes and adoption of change initiatives.

Solution

We contracted as a fractional Sr. Global Director of Customer Success, Outcomes & Growth, then worked closely with the VP of Customer Success (now SVP) and Director of CS Ops to craft and implement a new groundbreaking customer success strategy.

Our comprehensive solution included combining our signature C.S.A.T. Growth-Engine Tool, expanding the team's CS expertise, establishing best practices, creating standardized and relevant assets, and implementing the well-known ADKAR Change Management process to chart a path forward.

Our strategy prioritized transitioning teams from generalized to specialized roles, fostering mastery in their respective domains. And we facilitated the formation of four distinct teams—tailored to their customers' diverse needs.

For the new Outcomes & Growth team, we defined career paths to promotions, updated their hiring process, and enriched their Employee Onboarding Program with customer success-focused training modules to ensure a new hire's adherence to the new delivery model.

Moreover, our comprehensive change management and communication plan navigated decision-making complexities and streamlined consensus-building processes to expedite change. Some of these included strategic alignment sessions, Gainsight conference attendance, virtual and onsite training workshops and coaching, celebrating wins, and more; all of which instilled confidence and clarity among team members, mitigating apprehensions and fostering excitement for change.

Results

- C.S.A.T. Growth-Engine Indicators:**
 - C.S.A.T. Growth-Engine Maturity: Increased 2.5X in 12 months
 - Revenue: 2X revenue growth in 6 months
 - Revenue Expansion: 2X increase in (CSQL) opportunities within 1 month
- Customer Success Growth Indicators:**
 - Advocacy: 3X increase in (CSQA) opportunities within 1 month
 - Fast-time-to-Value (FTTV): 14% increase
- Other Growth Indicators**
 - Headcount: 14% increase in last 6 months
 - Career Growth: 2 promotions in 6 months
- Additional Value**
 - Investor Demand: Sizable growth equity PE Firm acquisition for undisclosed amount.

Custom Deliverables

Charter: 5 of 5 focus areas	Approx 16 Charters covering all CS functions & roles: Mission, Metrics, Activities, Dependencies, Risks, etc., book of business, playbooks, EBRs, statistically proven talk tracks
Strategy: • 3 of 5 focus areas	CS Re-Org, CS at Scale, segmentation & engagement, lifecycle mapping, best practices
Analytics: • 2 of 5 focus areas	Tech stack per team consolidation, analysis of onboarding, project management, and customer success platforms, customer health score guidance
Talent: • 4 of 5 focus areas	New hire journey, CSM DNA profile, Sr. CSM JD, hiring template with bias deterrents, 13-week employee onboarding process, team forecasting resource model
Add-Ons • ADKAR Change Management	Change Management Strategy, Change Management communication plan and execution, Renewal Transition Plan and execution.

By embracing change and prioritizing customer-centricity, this utility construction leader has unlocked new dimensions of SaaS growth and performance, setting a new standard for excellence in the utility construction management industry.