



building stronger
*customer
relationships*

science-backed conversation
skills for customer success

unrealized *potential*

Every part of the enterprise plays an important role in driving growth. But, considering **70-80 percent of a company's revenue comes from existing customers**, the customer success team has an outsized role as an architect for commercial growth.

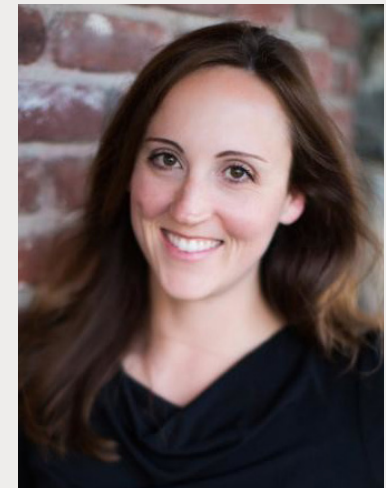
Sadly, most organizations fail to realize that growth potential.

Companies are quick to invest in enabling their sales reps to articulate value to new prospects. But customer success gets short shrift in terms of training or enablement to support ongoing commercial conversations with those same buyers.

In fact, nearly half the B2B companies we surveyed **invest less than 10 percent of their marketing budgets in messaging and content for critical customer success situations like renewals and expansion**. And fewer than half develop customized content for these conversations. The majority re-use the same messages and content across marketing, sales, and customer success, regardless of whether they're talking to a prospect or an existing customer.

That's a problem, given that existing customers' buying motivations are 180 degrees different from those of new prospects.

In this e-book, you'll learn why existing customers make the decisions they make, how your customer success managers can articulate meaningful value, and what it takes to fully realize the potential of customer success as a growth engine for your organization.



Nicci Nesmith Hammerel

EVP of Customer Success
and Chief of Staff
Corporate Visions



the malady of *misalignment*

A recent industry survey from software provider Totango uncovered a surprising statistic: **60 percent of companies have lost accounts because they were unaware their key stakeholders and influencers were not aligned** or had left the organization.

Most customer success managers get so focused on adoption, utilization, satisfaction, and problem resolution, they lose track of the metrics and goals that decision makers actually care about.

Managing these foundational elements of the customer relationship is important, but they shouldn't come at the expense of helping your customers hit their higher-level strategic goals.

Your customers' executive decision makers approved the expense to work with you because your sales team promised them value—top-level value that would propel them toward their company's strategic goals. But if you don't show them how staying with you, and potentially buying more from you, will help them meet those goals, they're more vulnerable to your competitors' disruptive messages.

Thankfully, you have a secret weapon to support your customer conversations. It's called your "incumbent advantage," and when you use it properly, you'll have a significant edge in keeping and growing your customer relationships.

avoid the commercial
messaging void

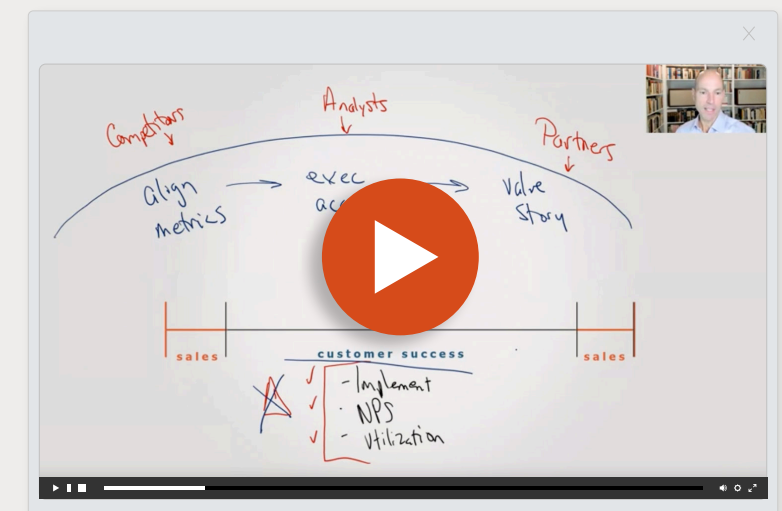


Rob Perrilleon

SVP of Delivery Services

If you're not bringing new insights and opportunities to your customers regularly, the relationship could get lost in the commercial messaging void.

► Learn more in this video



lean into your *incumbent advantage*

Every customer-vendor relationship boils down to value over time. After your customer signs the deal, they should start immediately realizing value in terms of business impact and results.

Your customer should be loath to give up that progress by making a change at the wrong time.

They invested time, money, and political capital to implement your solution. In their mind, these are sunk costs—investments your customer made that they'll never have to make again, provided they stick with you.

So, when a competitor shows up promising additional value, it's only potential value. Your competitor's solution is still unproven, the cost and impact are both unknown, and change comes at the risk of losing the initial progress, as well as any future value, from your solution.

That's a lot of uncertainty compared with your documented value and the customer's sunk cost. And that uncertainty is what gives you the incumbent advantage.

what is the
incumbent advantage?

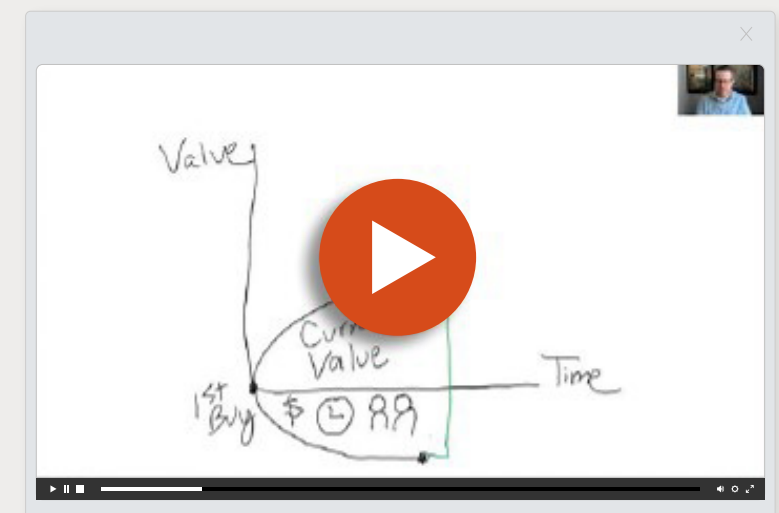


Doug Hutton
SVP of Products

Just like in politics, it can be very challenging to displace an incumbent because of all the advantages they have.

Because you're the customer's status quo, you can leverage your incumbent status in your conversations with existing customers.

► **Learn more in this video**



close the
*commercial
messaging void*

In this e-book, you'll learn how to lean into your incumbent advantage by aligning your value with the right metrics early, maintaining executive attention, and facilitating commercial conversations to effectively keep and grow your customer relationships.

▶ **CREATE SUCCESS**

▶ **ELEVATE SUCCESS**

▶ **EXPAND SUCCESS**



close the commercial messaging void

After your customer signs the deal, they need to see the value of their investment. That means you need to manage the change and align your value with the right metrics early in the relationship.



Create Success

status quo bias

The psychology of a prospect (who currently has an incumbent vendor you're trying to displace) is fundamentally different from the psychology of a customer (when you're the incumbent trying to protect or expand your incumbency). And it's all because of a psychological concept called "Status Quo Bias."

Psychological studies have shown that when faced with a decision, most people tend to stick with their status quo.

People naturally view change as costly and unsafe. If the perceived benefits of a new solution don't outweigh the perceived costs of changing their status quo, people tend to resist taking action. They prefer instead to continue on the path they're already on—even if the alternative is objectively better.

How does Status Quo Bias affect your onboarding conversations?

When you're onboarding a new customer, the team of people you work with to implement your solution are probably not the executives who made the decision to change from the status quo and buy. Your contacts may still be pre-disposed to resist change, which means **your role at this stage is less about project management and more about change management.**

Inertia is powerful. So how do you help your customers gain momentum quickly and make inertia work in your favor?

the four causes of status quo bias



Tim Riesterer
Chief Strategy Officer

In his study *The Psychology of Doing Nothing*, research psychologist Christopher Anderson details four causes of Status Quo Bias.

1. Preference Stability – If a customer's preferences change less often, or remain static, they're more likely to stick with what they're doing today. Conversely, if you destabilize their preferences, you increase their openness to change.

2. Anticipated Regret/Blame – Humans chafe at the possibility of regret. It elicits all sorts of negative anticipatory emotions such as fear, dread, and anxiety. While the consequences of actual regret will play out in the future, the emotional experience of regret takes place in the present.

3. Cost of Action/Change – Changing the status quo often involves a cost of some kind—the transactional costs associated with the change, or the transitional resourcing costs of changing to something new. Change seems risky or costly, while sticking with the status quo registers as either neutral or even beneficial—even in the face of contrary evidence.

4. Selection Difficulty – When prospects and customers are overwhelmed with too many options and too little contrast, everything seems to look alike. This amplifies their tendency to view change as complex and cumbersome.

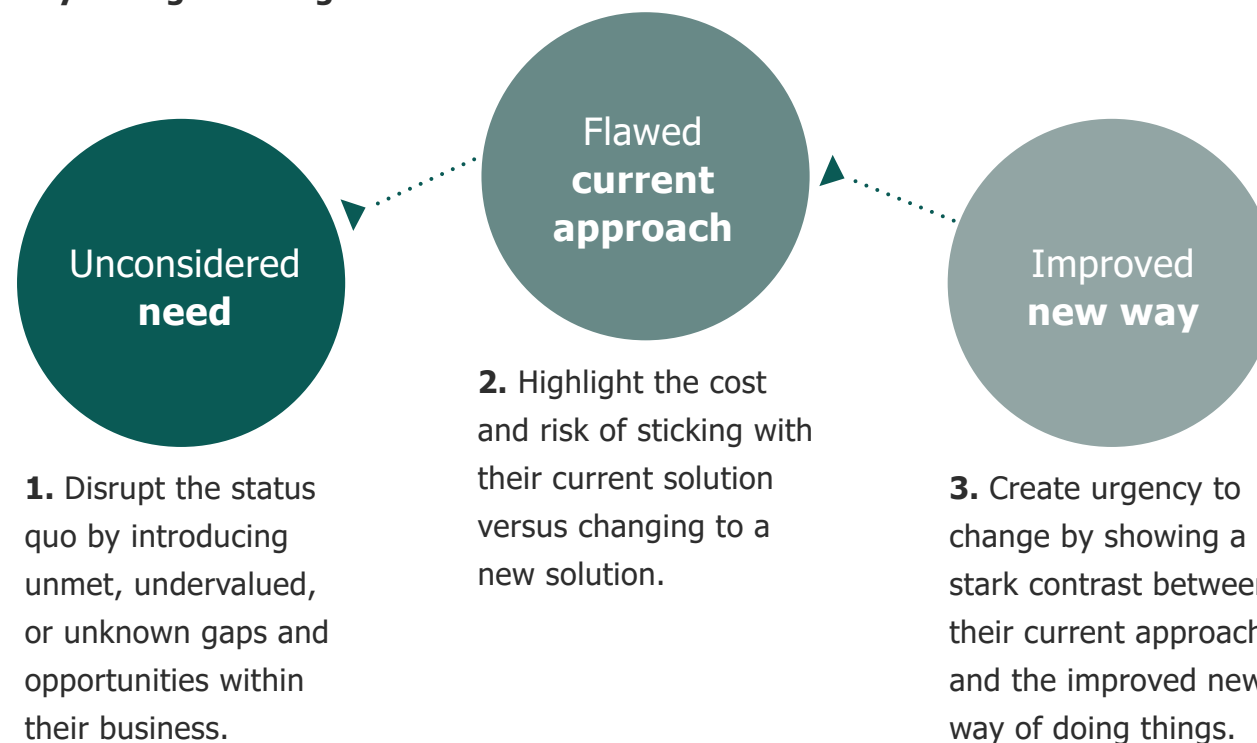
manage the *change*

Behavioral research from B2B DecisionLabs found that the most effective approach for acquiring new prospects is a Why Change message.

This message is designed to disrupt Status Quo Bias and motivate prospects to change by introducing what we call “Unconsidered Needs”—challenges, shortcomings, or missed opportunities that the prospect doesn’t yet know about but are holding them back from their most important business goals.

.....

The Why Change message



When delivered effectively, the Why Change sales story eventually leads prospects to make a deliberate decision to abandon the status quo in favor of your solution.

a customer unmoored



Tim Riesterer
Chief Strategy Officer

Your customer decided to raise anchor and change from their status quo. But they haven’t yet attached themselves to you.

Your implementation will likely take time, which means your customer will incur costs up front while value trails. Your solution might even need to coexist with the previous solution for some period, which increases your risk.

So much of this early-stage cementing of the status quo falls on the shoulders of customer success. But there’s plenty of room for marketing and sales to pitch in.

Involving sales in these early customer success interactions can help reinforce the Why Change proposition that won the initial deal. Marketing can shift its messaging from disrupting to reinforcing, catching auxiliary customer contacts that could drive broader sentiment and advocacy across the organization.

A unified front can accelerate your solution as the new status quo—making Status Quo Bias work for you much faster than your legacy competitor can possibly hold on.

plan the partnership

Even after your customer makes the decision to change and you've won the deal, you're not automatically their status quo. You still need to earn their trust and loyalty by delivering on the promise your sellers made in the Why Change conversation.

That's why it's vital that customer success teams get involved in partnership planning as early as possible in the relationship—even before the contract is signed.

If your customer success managers understand why the customer decided to change in the first place, they can plan the partnership more effectively around those executive-level goals and metrics.

Your ability to create profitable outcomes depends on how well you navigate these partnership planning conversations. These moments help define your customer's perception of your value and cement the relationship.

To effectively plan the partnership, consider the concept of "Pivotal Agreements."

how to use pivotal agreements



Doug Hutton
SVP of Products

Pivotal Agreements are value-based exchanges that you can use to speed up implementation and advance the customer partnership.

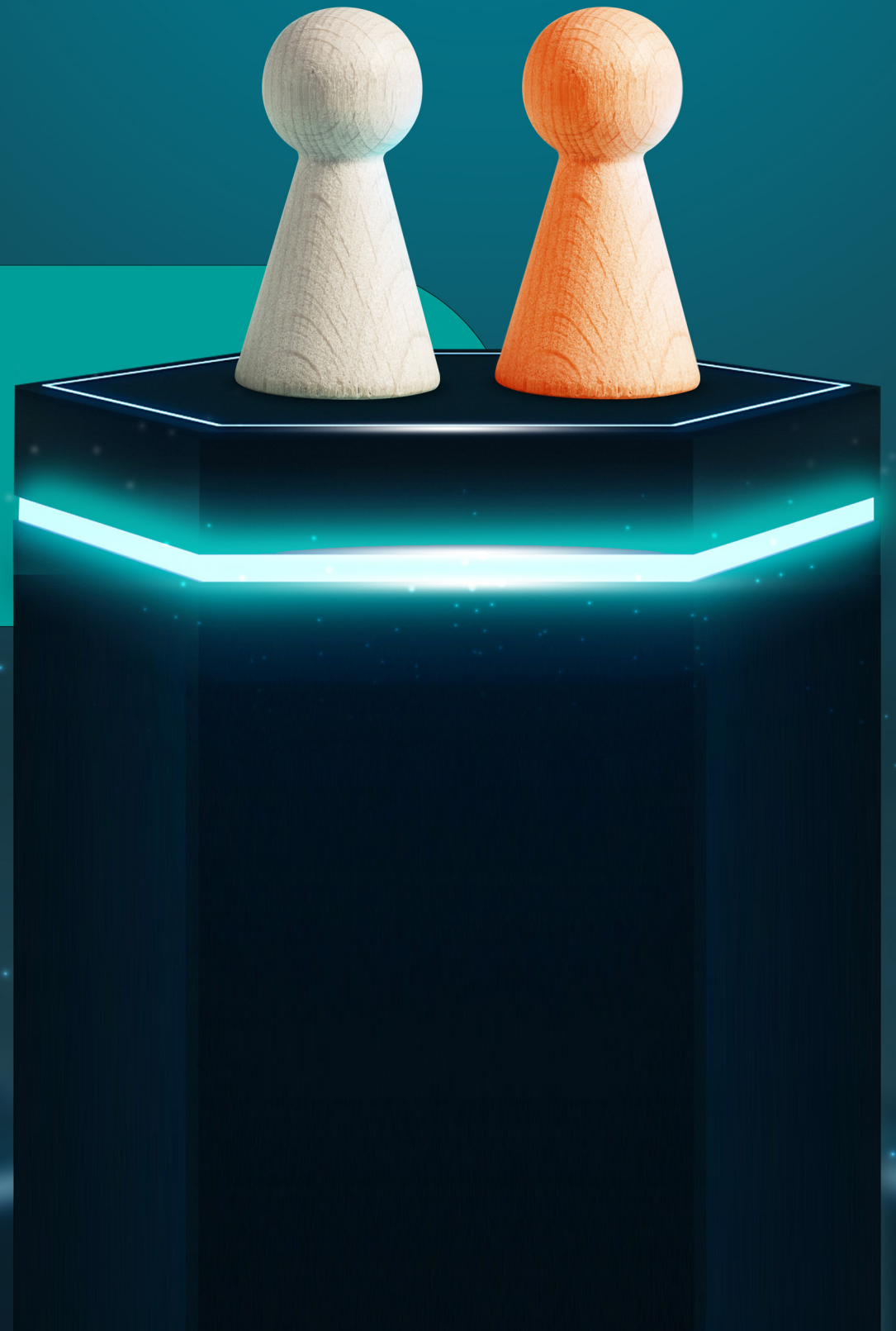
► Learn more in this video



close the commercial messaging void ▲

Your customer chose you because they believed you would make a meaningful contribution toward their strategic business goals. To protect and defend the relationship, you need to keep executive stakeholders engaged and informed throughout the relationship.

Elevate Success



overcome

your fear of heights

Most companies aren't satisfied with their ability to articulate value to senior executives.

- **67 percent say they're underperforming** at getting executive-level prospects to buy now rather than later.
- **Only 39 percent are confident** in their ability to build a meaningful business and financial case to justify a decision.

These are significant issues, considering that **80 percent of deals will require a VP or higher-level signoff**. And these issues don't just affect sales.

Unless executives understand the value you're delivering to support the strategy, the relationship remains vulnerable to outside influences. If you can't get senior-level stakeholders to attend your business reviews, they'll be less likely to sign off on a renewal. Or worse—you'll lose the relationship entirely.

Executives are barraged by disruptive messages from your competitors, industry analysts, and even well-meaning partner organizations. So you need to build a protective barrier by speaking to them at their level, on their terms.

wrong metrics...
or wrong person?



Tim Riesterer
Chief Strategy Officer

In conference rooms all over the globe, customer success teams are conducting business reviews right now, outlining the utilization of your product, hours billed, what features have been adopted, etc.

These metrics prove your busy-ness, but they aren't results. They're leading indicators for larger revenue, expense, cash, or balance sheet goals.

Account managers and customer success managers often don't measure or report on strategic business outcomes, nor do they connect the dots between leading indicators and the customer's corporate goals.

Sometimes your conversations merely reflect what your contacts want to talk about. But if the team you're meeting with for quarterly business reviews doesn't care about or know their business' goals, you can be sure you're not talking to the ultimate decision makers.

And that means your relationship is totally vulnerable to competitors who are.

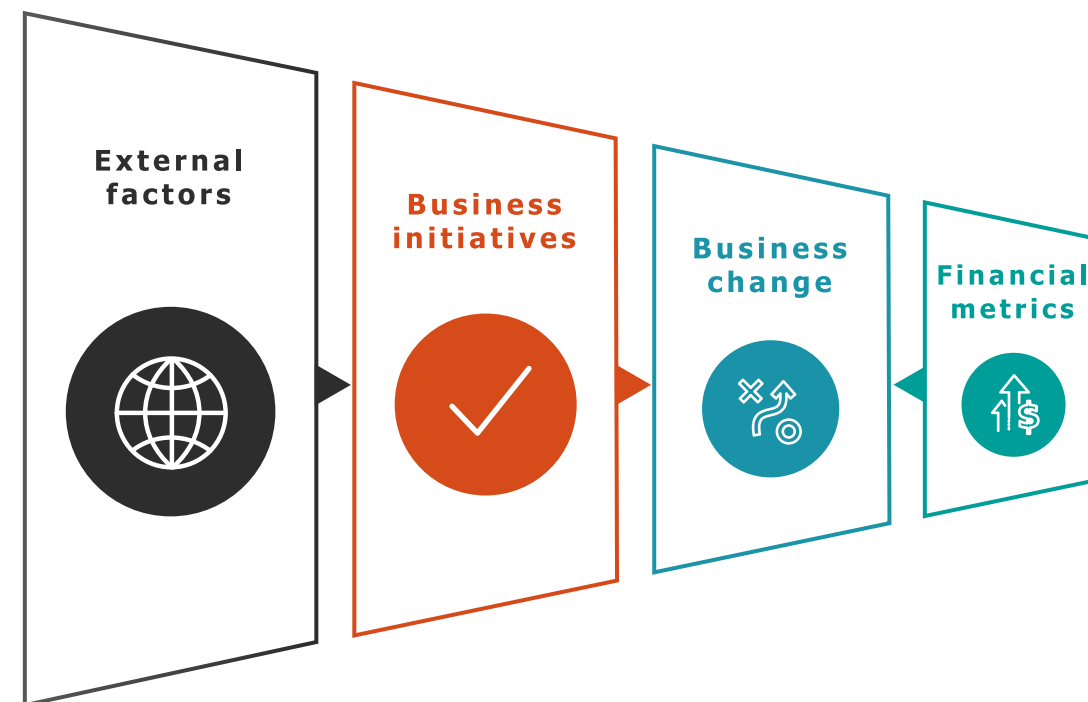
gain your *customer's* perspective

When you're sitting across from a CXO, you only get one shot to pique their interest.

If you don't bring enough knowledge and insight to the conversation, they'll tune out, and you'll lose your executive access.

To hold executive attention, it's not enough to be competent in your own business. **If you want to win over C-suite buyers, you need to show that your head is inside their business—not just your solution.**

To make it happen, you need gain your customer's perspective.



1. Highlight external factors

External factors—e.g., regulatory and technology changes, tariffs, interest rates, oil prices, and geopolitics—are out of the control of your C-level decision maker. They're literally what keep executives awake at night (but please, don't ever ask any executive that question).



2. Identify business initiatives

Your customer establishes business initiatives at the corporate level in response to opportunities and threats presented by external factors and industry trends. These are the major drivers of the company.



3. Share the business change

The business change creates a vision of where you want to lead the customer. It describes how your customer is operating today and contrasts their current approach with how they will operate differently by implementing your solution.



4. Quantify financial metrics

Financial metrics are what customers will use to justify investment. Even at an executive level, people make decisions subconsciously. Then they use logic and reason to justify the decision to themselves and others. That's why it's vital to underpin the buying vision with quantifiable ROI.

maintain *executive attitude*

Most companies focus on typical customer success drivers, using metrics like utilization, adoption, etc. But while you're reporting on usage metrics and project status, that same executive's name is moving through your competitors' sales funnels.

Your competitors are actively trying to disrupt your customer's status quo (you!) and woo them away with new insights. And when your relationship is under siege, you won't win with project-level metrics because they aren't what decision makers care about.

To protect and defend the relationship, you need to prove you're helping your customer make progress toward meaningful business goals and that you're ahead of evolving pressures that might put those goals at risk.

In other words, you need to maintain executive-level altitude when you're documenting results.

Your ability to document results by connecting project-level metrics to executive-level strategic outcomes is a cornerstone of every commercial conversation you'll have with your customers.

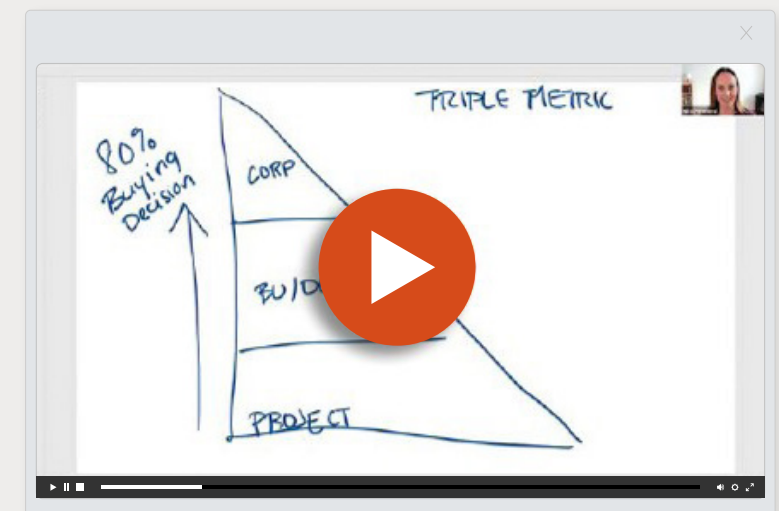
how should you
document results?



Nicci Nesmith Hammerel
EVP of Customer Success
and Chief of Staff

The Triple Metric is a useful framework to connect your project-level metrics to strategic outcomes that decision makers care about.

► [Learn more in this video](#)



close the commercial messaging void ▲

Your customers face evolving pressures that continually change their requirements for success. To protect and grow the relationship, you need to continually bring them new insights and relevant solutions.

Expand Success



keep and grow the relationship

When companies talk to existing customers, they often only focus on the problem they initially needed to solve.

Perhaps it's because they don't want to rock the boat. But it's a huge mistake to assume your customer doesn't want to hear about shifting industry pressures that will put their goals at risk.

The world is dynamic. Your customers face evolving pressures that continually change their requirements for success.

If you aren't continually reinforcing your value and supporting your customers with relevant solutions, they're even more vulnerable to your competitors' disruptive messages.

The goal is to make your customer feel safe and assured that they're already working with a partner who can help them solve new challenges as they arise. They won't need to look elsewhere.

Even if your customer isn't ready to act on the pressures you expose now, you were the one who brought them to light (not your competitor), so you get the credit. That strengthens the protective barrier around your relationship.

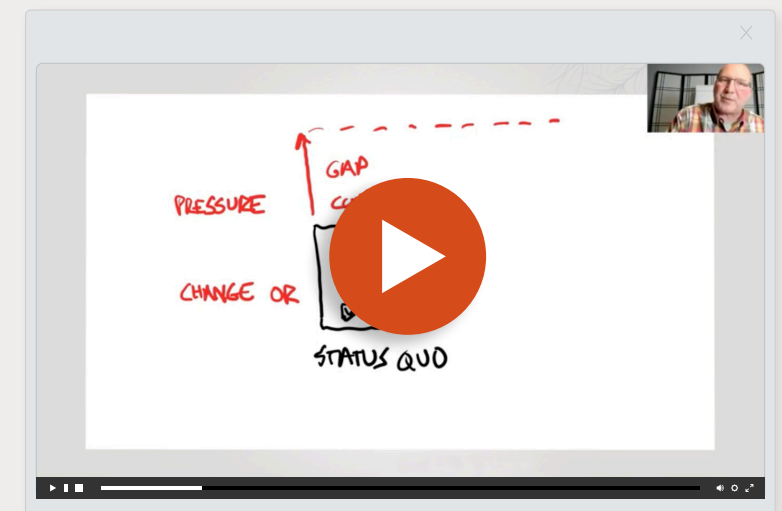
from "or" to "and"



Paul George
Senior Consultant

Your competition will continue to challenge your position as your customer's status quo. If you're not showing them how they can stay with you *and* stay competitive, you risk losing the relationship.

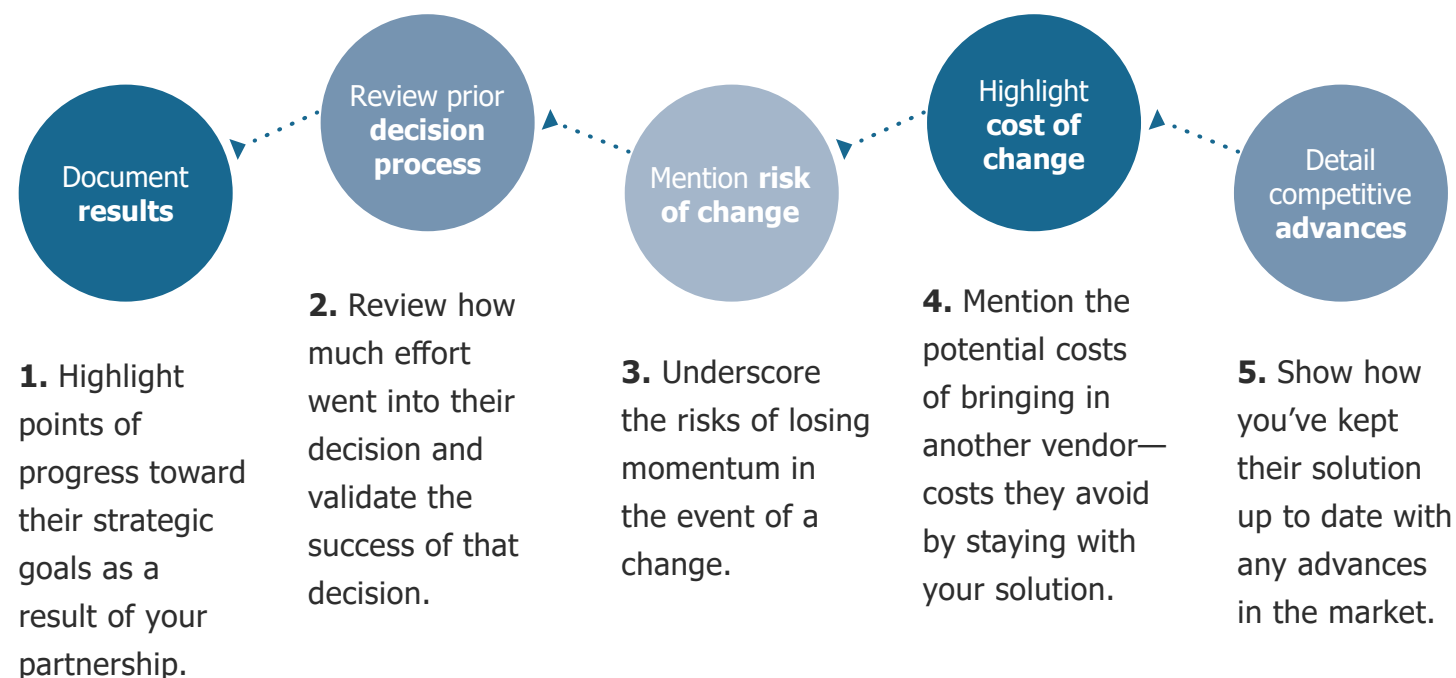
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renew your customers

When you're trying to persuade existing customers to renew, use the Why Stay message to show them the progress they've made with your solution while defending your position as the status quo.

The Why Stay message



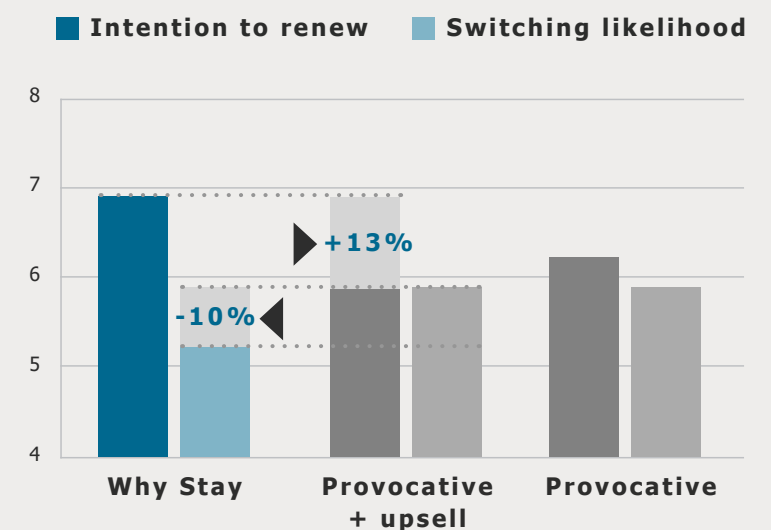
Documenting results is a critical first step in this message framework. Renewal conversations require an approach that *reinforces* your value as the customer's status quo.

the research behind Why Stay



Dr. Zakary Tormala
Social Psychologist

According to a B2B DecisionLabs study led by behavioral expert Dr. Zakary Tormala, this Why Stay message that reinforces the status quo led to a **13 percent boost in intention to renew**, and people were **10 percent less likely to switch or shop around**, compared to more provocative messages.



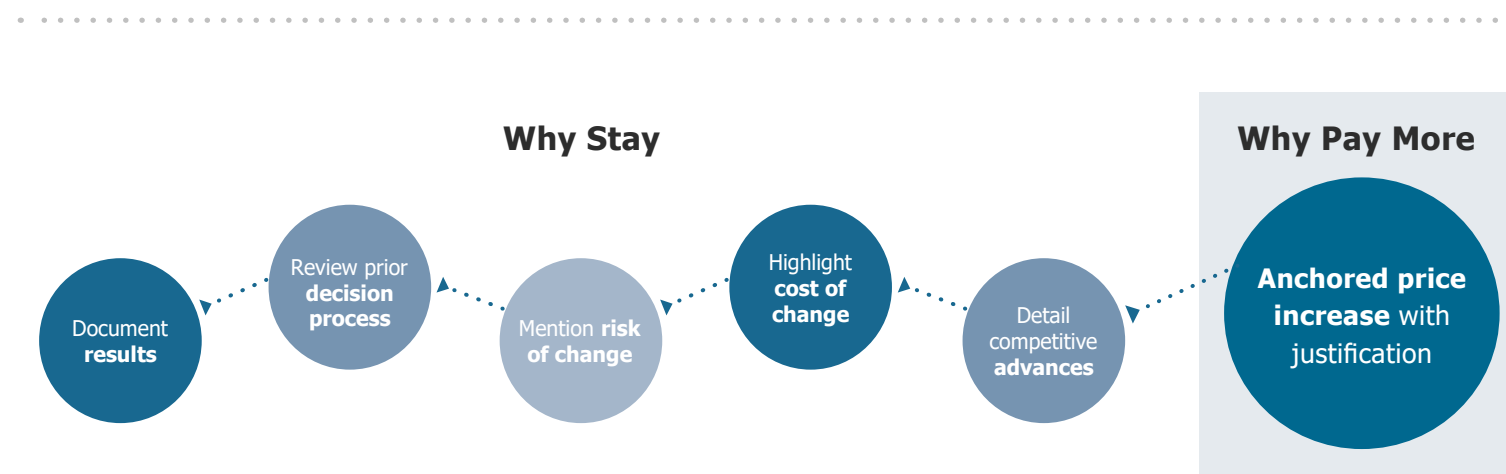
► [Read the full research study here](#)

anchor your *price increase*

Nearly **70 percent of companies describe their price increase conversations as “50-50” or worse** in terms of how well they go over with customers.

It’s not surprising that most price increases aren’t received too well. After all, no one enjoys spending more money just to stay with the same solution. But for companies with aggressive growth goals, this is an essential conversation—one that customer success needs to understand and support.

The Why Pay More message follows the Why Stay framework with one important difference: a sixth step that broaches the price increase by anchoring a higher price before introducing a loyalty discount.



6. Provide a high anchor for the price increase before offering a justification-based discount.

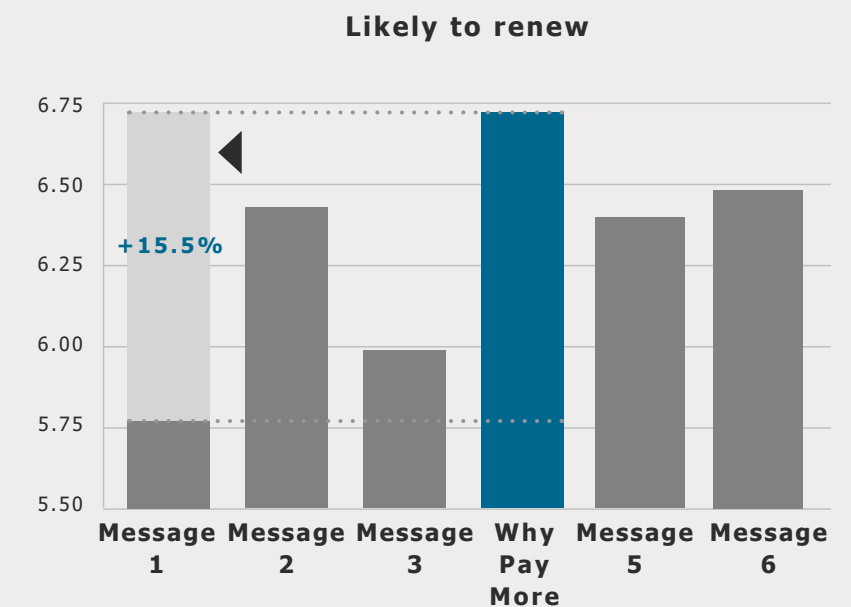
This approach works because of a cognitive bias known as the “Anchoring Effect.” When people face a decision that involves uncertainty, they’ll anchor on a reference point and ascribe value based on that. By setting the anchor as a reference for your customer, you’re better able to influence their perception of your price increase.

the research behind Why Pay More



Dr. Nick Lee
Behavioral Scientist

According to a B2B DecisionLabs study led by behavioral scientist Dr. Nick Lee, participants who heard this Why Pay More message were **15.5 percent more likely to renew and felt 19 percent more favorable attitudes**, compared to a disruptive price increase message.



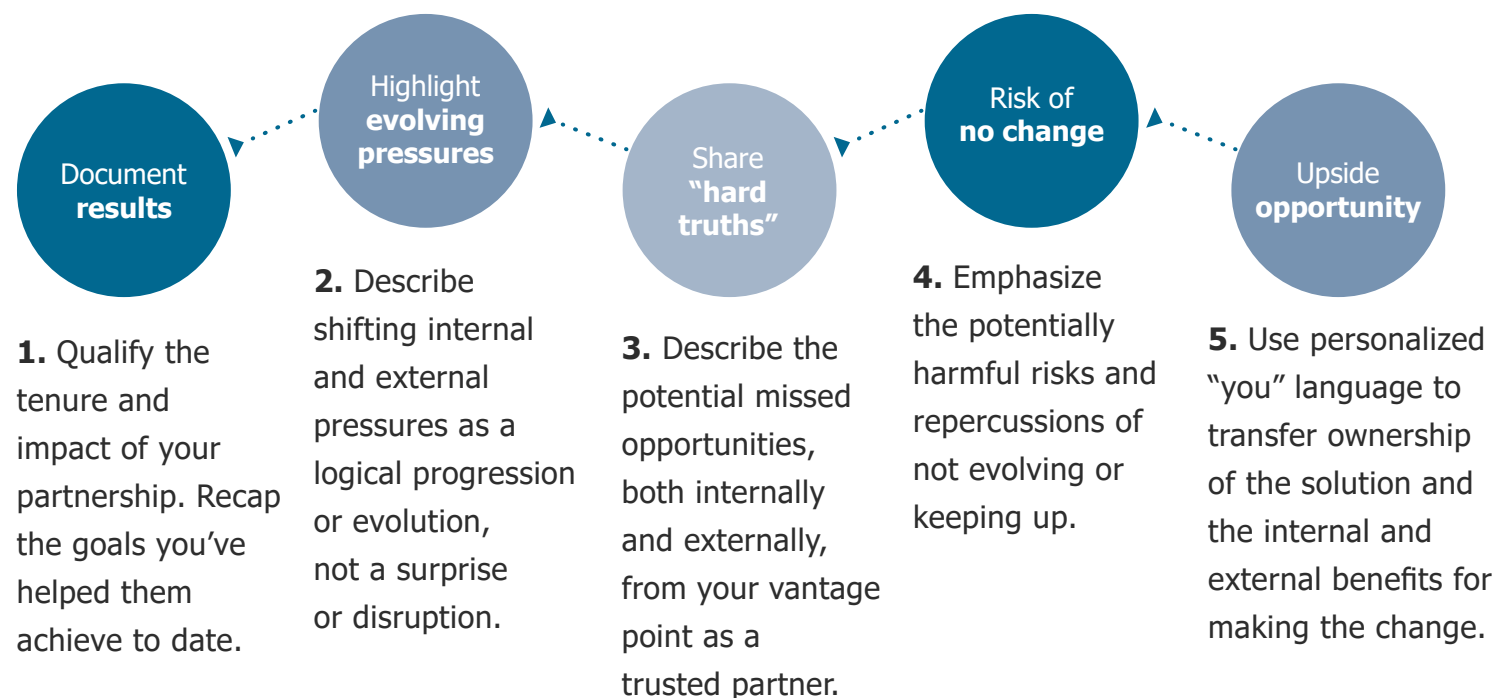
► [Read the full research study here](#)

control the change

The goal of a Why Evolve message isn't to disrupt the status quo, nor is it to get customers to renew an existing solution. It's about getting the customers to evolve—embrace change, but only as a logical progression of the ongoing pursuit of their goals.

This "controlled change" message ensures they won't stagnate while inspiring them to embrace your innovations with confidence and enthusiasm.

The Why Evolve message



Why Evolve is essentially a hybrid message that includes elements of a provocative new customer acquisition story (Why Change) and elements of the more protectionist customer renewal story (Why Stay).

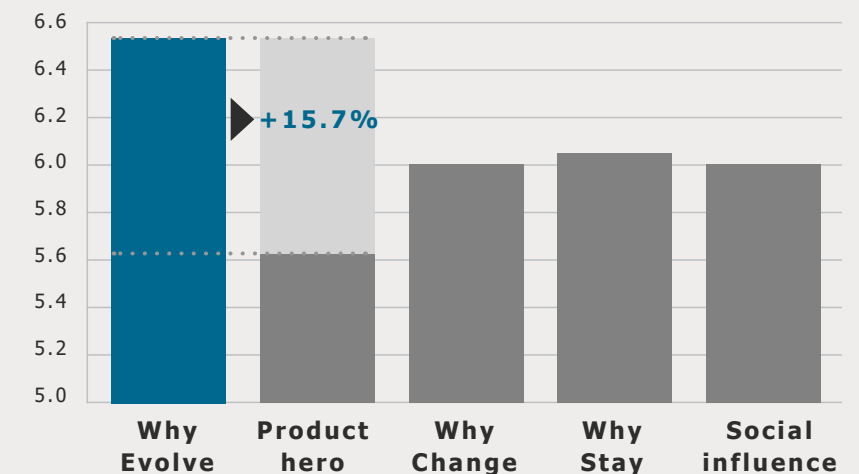
the research behind Why Evolve



Dr. Nick Lee
Behavioral Scientist

According to a B2B DecisionLabs study led by behavioral scientist Dr. Nick Lee, this Why Evolve message significantly outperformed other messages when trying to convince existing customers to purchase a new solution.

Likelihood of purchasing new solution



► [Read the full research study here](#)

rebound when things go wrong

When you're able to point to specific performance gains directly related to your customers' original goals, it's much easier to keep and grow the customer relationship.

But what if something goes wrong? And what if you're the one who screwed things up?

No matter how you phrase it, apologizing for a service failure is never easy. Your customer's upset, and you need to salvage the relationship (and their business).

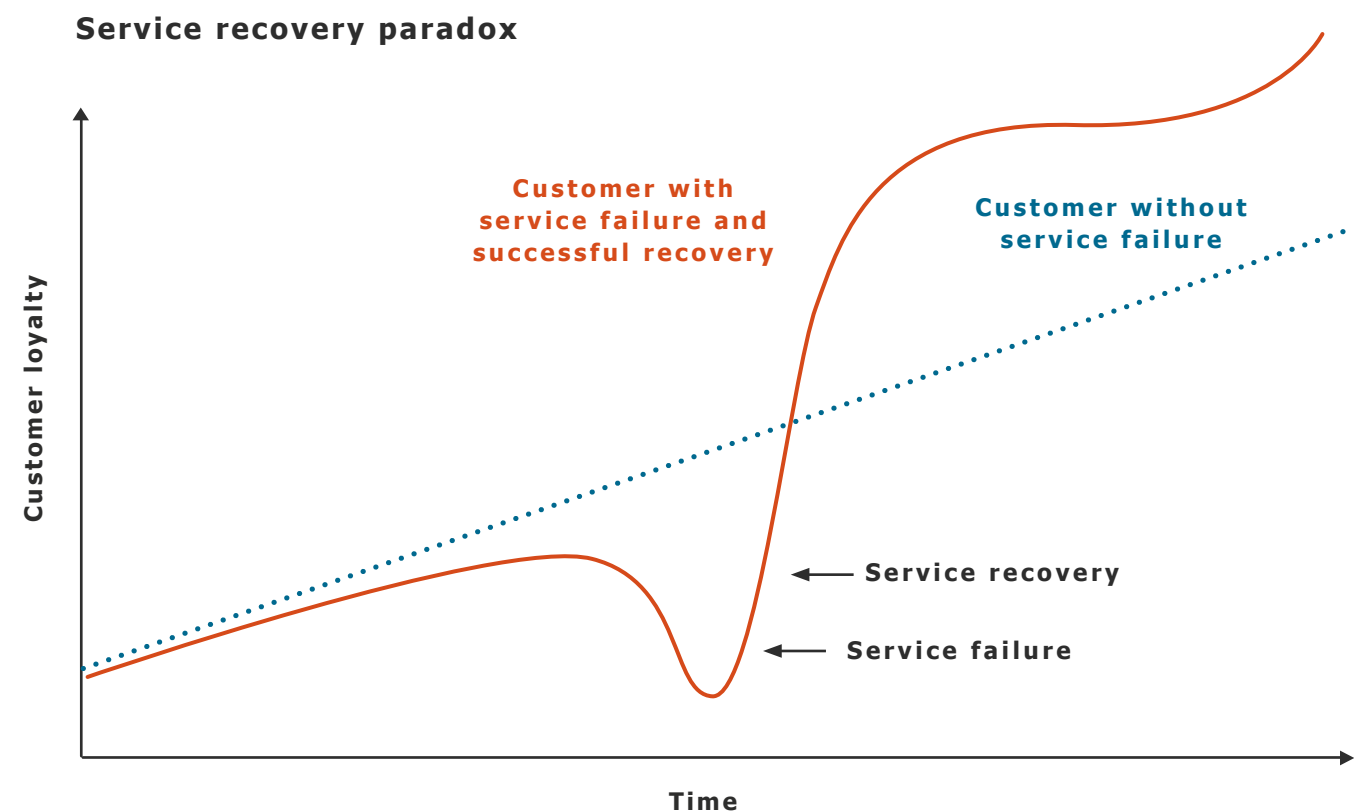
If you don't phrase an apology the right way, you not only risk losing the customer you've wronged, but you also risk all future revenue from that relationship. Losing that customer also means losing the opportunity to grow or expand within their account.

No matter what went wrong, both the way you handle that failure and the conversations you have along the way are vital to managing your customer's feelings about you later in the relationship.

Handling a customer crisis the right way will not only rescue the relationship; it can advance it to an even higher level.

Researchers call this phenomenon the "Service Recovery Paradox:" a situation in which your customer thinks more highly of you after you've corrected a problem than if they'd never had the problem to begin with.

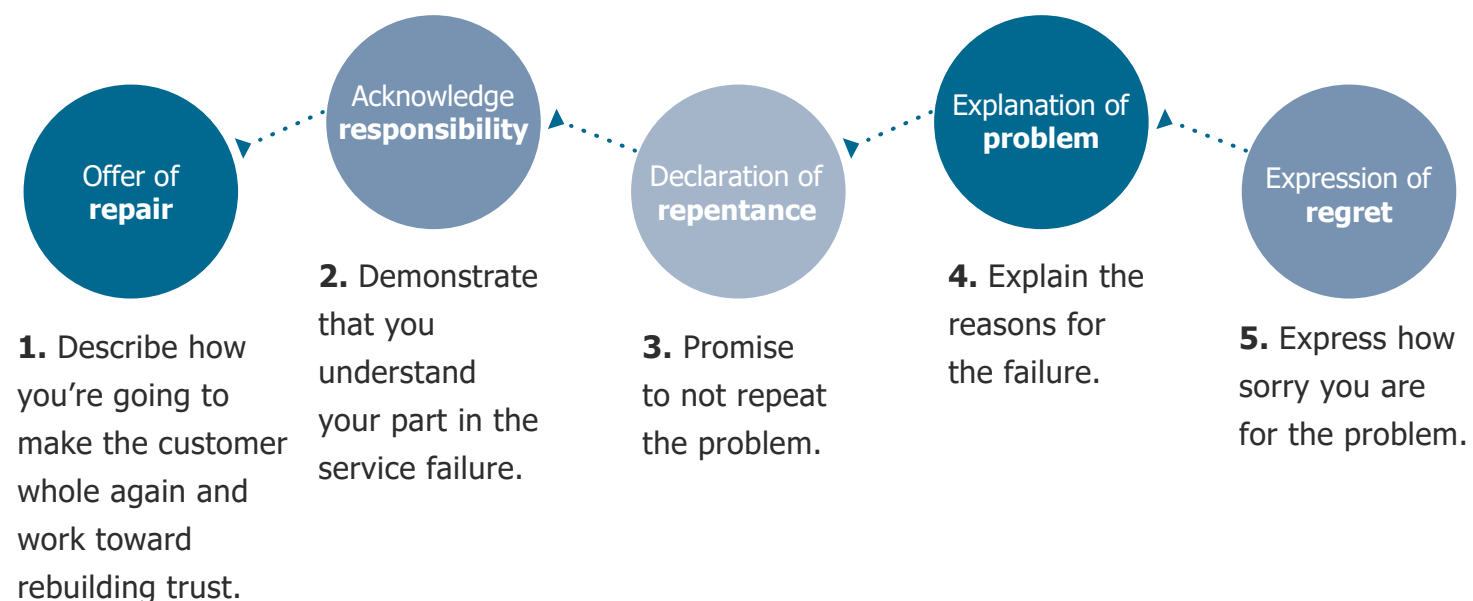
In other words, a service failure is actually an opportunity to *increase* customer loyalty!



deliver your *apology*

The Why Forgive message measurably improves your ability to increase customer satisfaction and loyalty, even after a service failure.

The Why Forgive message



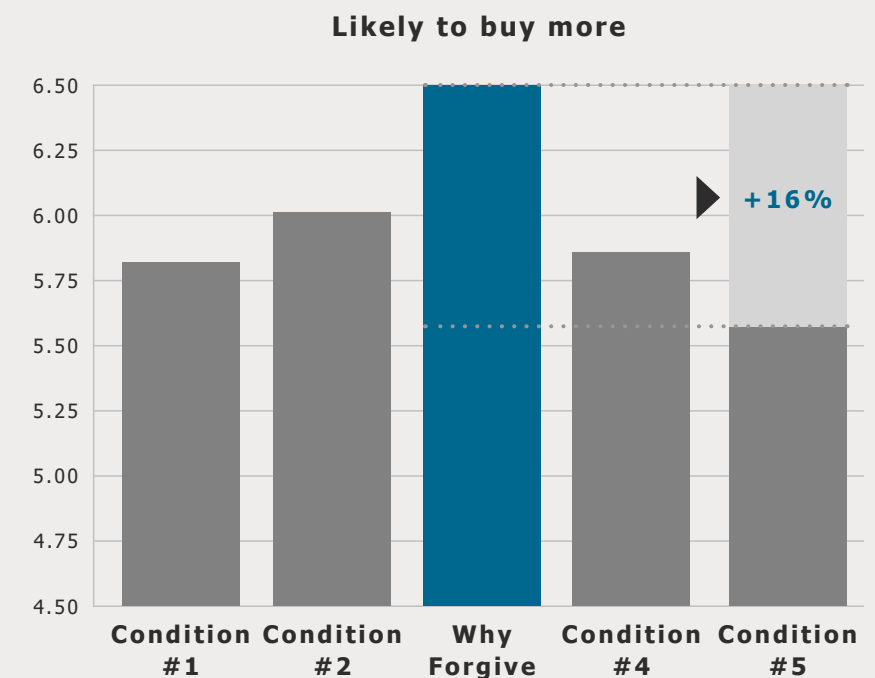
As with all the message frameworks in this e-book, it's not just what you say—it's how and when you say it. **The research shows that the order in which you present these components makes a big difference in how your message is received.**

the research behind Why Forgive



Dr. Nick Lee
Behavioral Scientist

According to a B2B DecisionLabs study led by behavioral scientist Dr. Nick Lee, decision makers who received this Why Forgive message were more likely to recommend the vendor and even buy more after a service recovery.



► [Read the full research study here](#)



close the *commercial messaging void*

Customer success managers tend to shy away from anything that feels, looks, or smells like selling.

They want their customers to see them as advocates for their happiness—to believe they’re personally invested and working incessantly to “surprise and delight” the customer every day. The last thing they want to do is upset that perception by trying to sell something.

But customer success doesn’t need to become sales. What they do need to become is value communicators.

Pleasing the customer is undoubtedly an important part of the job. But happiness isn’t enough. Customer success needs to uphold your customer’s best interests, which means helping customers succeed in an increasingly complex and ever-changing business environment.

Customer success has the unique opportunity to grow their role and become not just advocates but also architects for ongoing revenue growth. Don’t squander that potential.

Learn and apply the science and conversation skills in this e-book, and you’ll have what it takes to build profitable and long-lasting customer relationships.

► **CREATE SUCCESS**

Align value with meaningful metrics early in the customer relationship.

.....

► **ELEVATE SUCCESS**

Maintain executive engagement and access throughout the customer relationship.

.....

► **EXPAND SUCCESS**

Master commercial conversations to keep and grow the customer relationship.

about Corporate Visions

Corporate Visions is the leading provider of science-backed sales, marketing, and customer success training and consulting services. Global B2B companies work with Corporate Visions to articulate value and promote growth in three ways:

- **Make Value Situational** by distinguishing your commercial programs between customer acquisition, retention, and expansion.
- **Make Value Specific** by creating and delivering customer conversations that communicate concrete value, change behavior, and motivate buying decisions.
- **Make Value Systematic** by equipping your commercial engine to deliver consistent and persistent touches across the entire Customer Deciding Journey.

[CONTACT US TO LEARN MORE](#)

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Nicci Nesmith Hammerel is the EVP of Customer Success and Chief of Staff for Corporate Visions. Since her career at Corporate Visions began in 2009, Nicci has worked closely with companies like ADP, Dell, Oracle, and GE to develop and tell their stories in a memorable way. This experience has given her a unique glimpse into the challenges and triumphs corporations experience when reaching across departments and geographies to work toward a common goal.

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