



Trending Topics:

How to Improve Client Onboarding and Fight Churn from Day One

Part III - Implementation Project Monitoring - How CS Can 'Measure Up'

Before we dive into the last segment of our three part series on the Improving Client Onboarding to Fight Churn, here are the links to [Part I](#) and [Part II](#) where we looked at:

1. The impact of implementations on software revenue recognition
2. What delays and accelerates customer time-to-value
3. Improving vendor-client communications to ringavoid churn
4. Why measuring customer success during implementations matters
5. SaaS implementation audits and insights on monitoring client onboarding projects
6. Considerations for tracking onboarding performance, and more.

This is SaaS

SaaS executives expect nearly every business strategy and tactic to be both measurable and measured. This is, in part, because SaaS investors demand it. The ability to capture meaningful data is becoming table stakes in our world and as the significance of Customer Success (CS) departments and customer onboarding increases, CS leaders at every level are finding that the migration to metrics tracking has landed at their doorstep. Soon, having data to support your client onboarding efforts will become part of everyday life. No one will get a free pass. The shift is very real and has indeed arrived. This is us. This is SaaS.

Meaningful Metrics

We witnessed how data capture and management in SaaS Sales & Marketing became increasingly more sophisticated over the past decade, with the greatest leaps forward being in separating the wheat from the chaff; being able to extract data -- and data comparisons -- to help cut costs, increase efficiencies and make better decisions.

“... CS leaders at every level are finding that the migration to metrics tracking has landed at their doorstep.”

We're now advising CS professionals to expect that the speed at which CS departments learn to capture and utilize relevant data to improve operations and customer satisfaction will move even faster than it did in Sales and Marketing. We're also advising them to immediately become assertive in using operational data to:

1. Identify opportunities for improvement
2. Support their business case(s) when requesting resource allocation and process change.

First-mover Advantage

Baton's cofounder, Peter McCoy is fond of saying, "Measuring is better...measuring is always better." If this rings true in your experience with SaaS, you are not alone. Today CS professionals have a huge opportunity to seize first-mover advantage and begin using state-of-the-art software to get a better sense of what it takes to deliver high quality client onboarding, especially for complex technical implementations.

Taking Your Own Pulse

If you follow competitive running, after a race you've probably seen runners checking their own pulse. They do this because they use the measurement to compare to past, and yes, future performance. Competing in today's software market requires a similar approach to self-monitoring. Everyone on your team is 'running at record pace'

to help customers quickly experience the value in your software, and knowing day-to-day exactly where you stand in bringing the customer 'live' is exceptionally useful. Unfortunately, many software companies are misjudging how efficient they really are, especially if they're using tools like NPS or CSAT. Let's consider both:

- NPS is a great tool for understanding the likelihood of brand advocacy by your customers. However NPS scores are only captured at the end of the client engagement, so CS teams employing NPS scores to measure and understand their implementation team's performance, are only seeing a brief moment in time into their overall performance and not looking at a detailed assessment on the various phases, milestones, tasks and subtasks that a rigorous onboarding project entails.
- CSAT measurements also have value yet they are also usually void of detail that can really help your team improve its performance. Very little is captured regarding your company's broad, ongoing working relationship with your clients. CSAT scores are based on a single question such as, 'How satisfied were you with our offering?' Again, the measurement is too limited in scope and total time of engagement.

“knowing day-to-day exactly where you stand in bringing the customer ‘live’ is exceptionally useful.”

There's an emerging opportunity for project management software built specifically for SaaS implementations to engage with customers throughout their onboarding process -- from start to finish -- and compare that information month after month and even year after year. Experts in the CS field are calling it Pulse Scoring, while you may have only heard of it recently, we're betting it will soon be common vernacular in client onboarding.

Since NPS is used most frequently let's compare it with Pulse Scoring

NPS Scoring	Pulse Scoring
Performance data captured at end of project only.	Ongoing performance scoring throughout every engagement.
Dependent on memories of client participants.	Feedback is more reliable, as it is captured on a regular basis.
Score influenced by the prevailing issues or project status existing at end of any project.	Score captured intermittently so it better reflects the assessment of the overall project.
NPS is a historic-only review of what is typically a multi team, multi process effort.	Pulse enables various measurements to be taken by different processes (e.g. milestones) and by different teams and/or resources.
Too many questions. NPS questionnaires tend to be long and tedious to answer, which is why vendors often bribe their clients with Amazon gift cards.	Pulse asks a series of 1-3 questions, over time, allowing you to be quick with your clients' valuable time yet very specific, based on what's happening in the project.

NPS is only delivered to those with a full view of the project. Project managers and executives.	Pulse scoring allows you to target the exact people with whom you collaborated and ask about experiences where the project participant is fully knowledgeable. You get better input on how to improve or expedite your processes.
NPS is almost always product or outcome focused. Processes are hard to measure.	Feedback isn't solely outcome-focused. A pulse score is broken down into steps that get reviewed, thus it is better suited to measure processes.

Previously we reminded you that impressions are made until the software is up and running. Here are a few actions you'll want to consider taking if you're looking to demonstrate how your CS team 'measures up' in implementation the most challenging aspect of software customer onboarding:

SaaS Vendors Guide for CS - How CS Measures Up - Suggested Actions

- Recognize quickly that the “measure everything” mantra in SaaS is 100% here to stay for all departments - so don't wait for your investors to request data from your CS team
- Utilize project software built specifically for software implementation
- Be certain your implementation project management platform does the following:
 - Collects CS team performance data from start to finish
 - Specific and Intermittent client surveying to get a broad perspective of each engagement
 - Granular measurement (i.e. each milestone occurrence)
- Use the platform pulse data to track the following metrics:
 - Score-to-Churn Ratio
 - Pulse score to Time-to-Revenue Recognition Ratio
 - CS Team scores
 - Measure at the project level versus aggregate score across multiple projects
- **Our #1 suggestion** is to take a guided tour of Baton. Our Baton Score feature is the leading method to get a reliable pulse score for your implementation process. [Click here](#) to get a free Baton audit of your process.