

Measuring Digital CS Effectiveness Guide

The thought of measuring the effectiveness of a Scale / Digital Customer Success motion scares some CS leaders, because they aren't exactly sure how to. They know that they need to measure impact and share the business outcomes, but since so many come from a traditional high touch background, they aren't sure what the best methods are to measure effectiveness.

This thought doesn't need to scare you! This is not something you should run from or try to obfuscate. Digital Customer Success can be easily measured and quantified.

At the end of the day, Scale Customer Success is measured on same things as the rest of CS: leading indicators such as product adoption, outcomes achieved, value realization; and lagging indicators such as GRR, NRR, and other revenue metrics.

With that in mind, these various indicators will inform you on the effectiveness of your Digital/ Scale CS motion. Unsure how to leverage those for measuring your program's effectiveness? You will begin by documenting all of your customer-facing activities/resources, and then use data from your leading and lagging indicators to determine effectiveness of the program. We'll tackle both of these in turn.

To begin with, here are the steps you can take to **document your customer-facing activities** and ensure you have the necessary information to start:

- **Map out and document your entire digital customer journey, including the milestones that show they're achieving success.** This might currently live in your head, but make sure this is written out and documented somewhere. List out the journey a successful customer will go on with your product, and what are the digital touches they'll receive along the way. List out the adoption milestones and other indicators that let you know they are successfully moving through the journey.

- **Document the interventions a customer would receive, and what triggers them.** Since customers don't all move through a journey smoothly, intervention is needed at times. List out all of the digital and human-led interventions. This would include everything from in-app notifications to emails to CSM-led intervention. Additionally, map out what the indicators are that will trigger these various interventions. Is it product adoption, breadth of feature usage, outcomes achieved measurement, etc? Document this information.
- **For all 1:many and asynchronous programs you run, list out the expected outcome.** Whether you run office hours or a Community or a Knowledge Base or customer webinars or any other Scale Programs, document what the expected outcome is for change in customer behavior. Ensure this covers all of your leading (product adoption, Now that you have all of your Digital program activities documented, here is how you can **use data to measure its effectiveness** and ensure you're iterating in the appropriate areas:
- **Measure effectiveness of your digital program triggers.** On a regular basis (quarterly is usually a good place to start), look at all of your accounts that churned. Of those that churned, document how many were "flagged" by the intervention triggers you set up.
 - If this number is a low percent, then it is not the content of your CS interventions that needs to be improved. You will want to focus on how to improve the quality of your triggers to more accurately reflect the true risky behaviors of your customers.
- **Measure the effectiveness of your "demand gen" efforts.** This step is about measuring if you are effectively connecting customers with the resources (digital or human-led) that are meant to improve their behavior. This is an often-overlooked step that can result in iterating on the "wrong" things because of faulty assumptions. For example, if you intend for an office hours program to lead to an increase in product adoption, but not many customers attend the office hours, that doesn't necessarily mean that the office hours is ineffective. This is a "demand gen" issue. Look at how you are promoting your resources, how you are directing customers to them, and how you are asking them to engage with you. This has a lot in common with Marketing conversion analysis, so your Marketing team can also help you with this sort of calculation. The key here is to determine if you're effectively getting your customers' attention and connecting them with your resources.

- **Compare usage data of those that engaged with Digital content vs those that did not.**

This is where you are actually measuring the effectiveness of the content itself. Looking at the customers who actually engaged with and consumed your content (engaged with the Community, watched the webinars, clicked through the in-app notification, clicked on the call to action link in their email, etc), measure the change in their behavior. See if there was a change pre- and post-engaging with your content. This should be done as granularly as possible, even down to a by-user basis. Then, measure them against customer who didn't engage with your content. This will help you avoid attributing natural growth to your Scale Customer Success motion.

- **Pro-tip:** be realistic with your timeframe here. Some engagements have desired outcomes can be measured quickly. Others may take longer to see the impacts of. Use your discretion to understand when the ideal time is to take these measurements.
- **Don't ignore actual human validation and qualitative feedback.** This final step is key to remaining customer-centric. You certainly want to measure the data of your customers in a macro sense to quantify the customer data at a high level, but this doesn't remove the need to listen to customer feedback about the product, processes, support level, etc. Your CSMs, Account Managers, and Support team will be fantastic resources to collect this feedback. They will be able to relay feedback from customers about what is helpful and is not.

Following the steps outlined above will allow you to measure the effectiveness of your Scale / Digital Customer Success program. These steps can be repeated on an ongoing basis so you can ensure that you're focusing your energy in the right places, letting data guide your decision-making process.

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