



ROLE DESCRIPTION

# CUSTOMER

SUCCESS





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# Customer Success

This document describes the role by focusing on good and bad behaviours to clearly indicate what success looks like. It has been open-sourced from the Wildbit Good Bad Project

Role:	Customer Success Team Member
Level:	Individual Contributor
Skills & Behaviours	Customer Advocacy
	Customer Empowerment
	Customer Product Insight
	Information Seeking
	Customer Product Fit
	Customer Communication
	Outcome Orientation
Credit	Wildbit Good Bad Project

## Customer Advocacy

### Good

A good Customer Success team member cares deeply about making customers successful. A good Customer Success team member is the advocate and champion of each and every customer. A good Customer Success team member approaches each interaction with a fresh mindset and attitude. They recognize the uniqueness of each customer and always look for a way to both educate and learn from the customer.

### Bad

A bad Customer Success team member responds with emotion when dealing with a negative customer and carries that emotion into their interactions with other customers. They blame the customer for their problem. A good Customer Success team member understands that everyone has bad days and does not let that one negative experience ruin their day. They work from a place of empathy and empower the customer to resolve their problem, rather than blaming them for having the problem in the first place.

## Customer Empowerment

### Good

A good Customer Success team member empowers customers by taking the time to educate them. A bad Customer Success team member spends their time answering the same questions over and over. A good Customer Success team member follows through with customers and keeps them updated.

### Bad

A bad Customer Success team member leaves customers wondering if they were forgotten.

## Customer Product Insight

### Good

A good Customer Success team member thoroughly researches customer problems before giving a response. They look for ways to improve the user's experience with the product. They are familiar with available documentation and use it to help customers accomplish their goal or job to be done. They look for opportunities to improve existing educational material and create new materials when none exist. A bad Customer Success team member uses existing documentation as a way to cut corners in replying to customers. They use documentation to treat every problem the same when we know that every user has a unique need.

A good Customer Success team member is a front line to the entire team and communicates customer frustrations, requests, and compliments to the right people. They know what we are working on, how this will affect users, and they know how to communicate this effectively to users. They are proactive in reaching out to customers and know when this is appropriate.

### Bad

A bad Customer Success team member finds out about a release after the customer notices it.

## Information Seeking

### Good

A good Customer Success team member has the mindset of a detective. They know where to find information, how to combine resources to track down problems like a bloodhound, and when to ask for help. They know how to ask for help from teammates to minimize the support workload for everyone.

### Bad

A bad Customer Success team member asks a customer or developers for information they can easily find on their own. They quickly assign an issue to a developer without taking the time to work through the problem to understand and solve it. A bad Customer Success team member asks the customer a question that has already been answered, or that can be easily discovered.

## Customer Product Fit

Good

A good Customer Success team member knows how our products make customers successful and that they may not be the best fit for some people. They know when it is appropriate to tell someone they won't be a good fit, and what to suggest instead. A bad Customer Success team member doesn't care who our customers are or how successful they may be with our products.

A good Customer Success team member knows the competition thoroughly. They proactively conduct user research and produce actionable information as a result.

A good Customer Success team member will identify a particular successful customer, map out their journey, and then guide other customers using a similar path.

## Customer Communication

Good

A good Customer Success team member uses conversational language and tone. They communicate with customers using clear and concise writing to ensure the best resolution. A good Customer Success team member explains workflow steps in clear and plain terms rather than shorthand or internal jargon.

## Outcome Orientation

Good

A good Customer Success team member focuses on the right measurements. They develop and monitor clear metrics to understand customer happiness and engagement with their products. A bad Customer Success team member focuses on the wrong metrics and values quantity over quality. They are only interested in getting to the end of their day by quickly answering questions.



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