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Part IV: SaaS Sales and Customer Service

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Kampyle's SaaS Lectures: 10 Laws of Building a SaaS Company in Israel

Agenda

- Introduction
- What's Next? Upcoming Lectures...
- SaaS Sales and SaaS Customer Service
 - SaaS Customer Service – Definition
 - Software versus SaaS
 - Customer Service Objectives
 - SaaS B2B Company Lifecycle
 - How to Craft your Customer Service Strategy
 - Churn and Renewal Management

What's Next? Upcoming Lectures...

- Previous Lectures
 - SaaS Go-to-Market
 - Automatic Sales
 - Inside SMB Sales
 - Success Managers & Professional Services Teams
- Upcoming
 - Inside Enterprise Sales
 - Preparing Your SaaS Company for Recession Times
 - Managing SMB and ENT in ONE Company



SaaS Customer Service - Definition

SaaS Customer Service - Definition

- Different Faces of Customer Service
 - Support / Helpdesk
 - Success / Account Managers
 - Professional Services

Software versus SaaS

- Software
 - Onsite implementations
 - Long time and high cost to start work
 - Hard to abandon once implemented

- SaaS
 - SaaS is all about the business of renewals.

Customer Service Objectives

	Success Manager	Professional Services
Reduce Churn	V	V
Implementations	V	X
POC	X	V
Monthly Renewals	V	X
Yearly Renewals	V	V
On going support on different levels	V	V
Identify Up sale Opportunities	V	V
Identify PS projects and PS hours	X	V
Identify Additional Penetration	V	V
Assist Marketing with Valuable info from loyal customers	V	V
Assist Product with Customer suggestions / requests	V	V

How to Craft your Customer Service Strategy

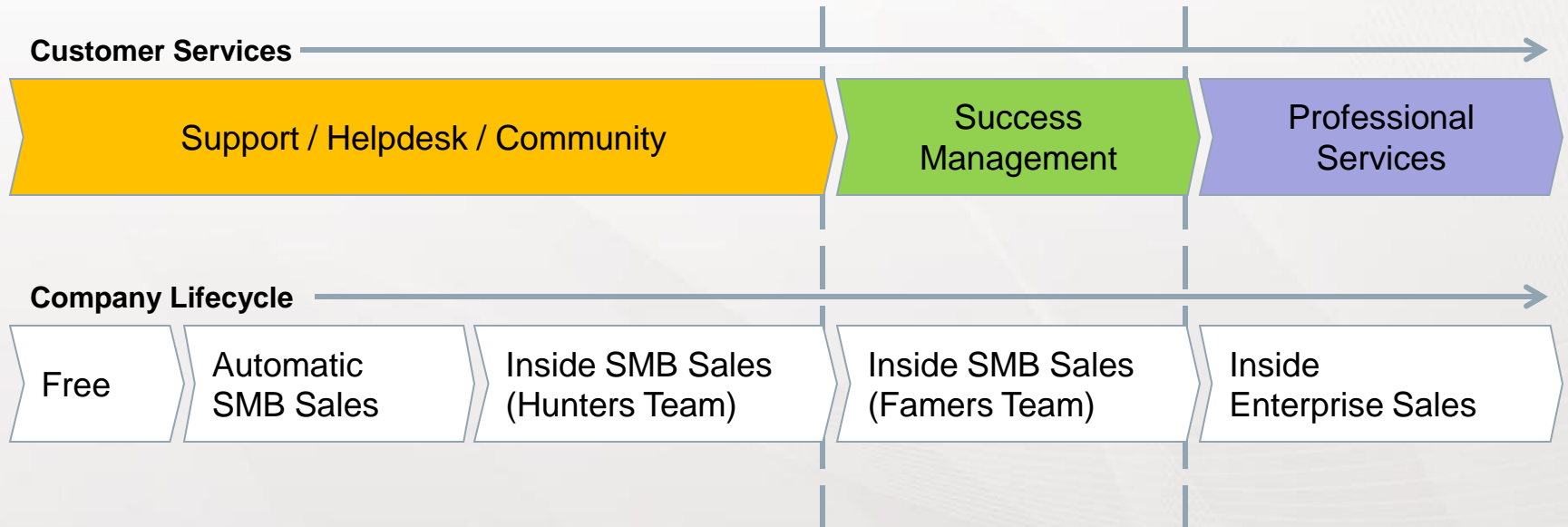
Basic considerations:

- B2B vs. B2C
- Automatic Sales
- Inside SMB
- Inside ENT
- Product
- Data you find along the way
(Churn and much more...)



B2B SaaS Company Lifecycle

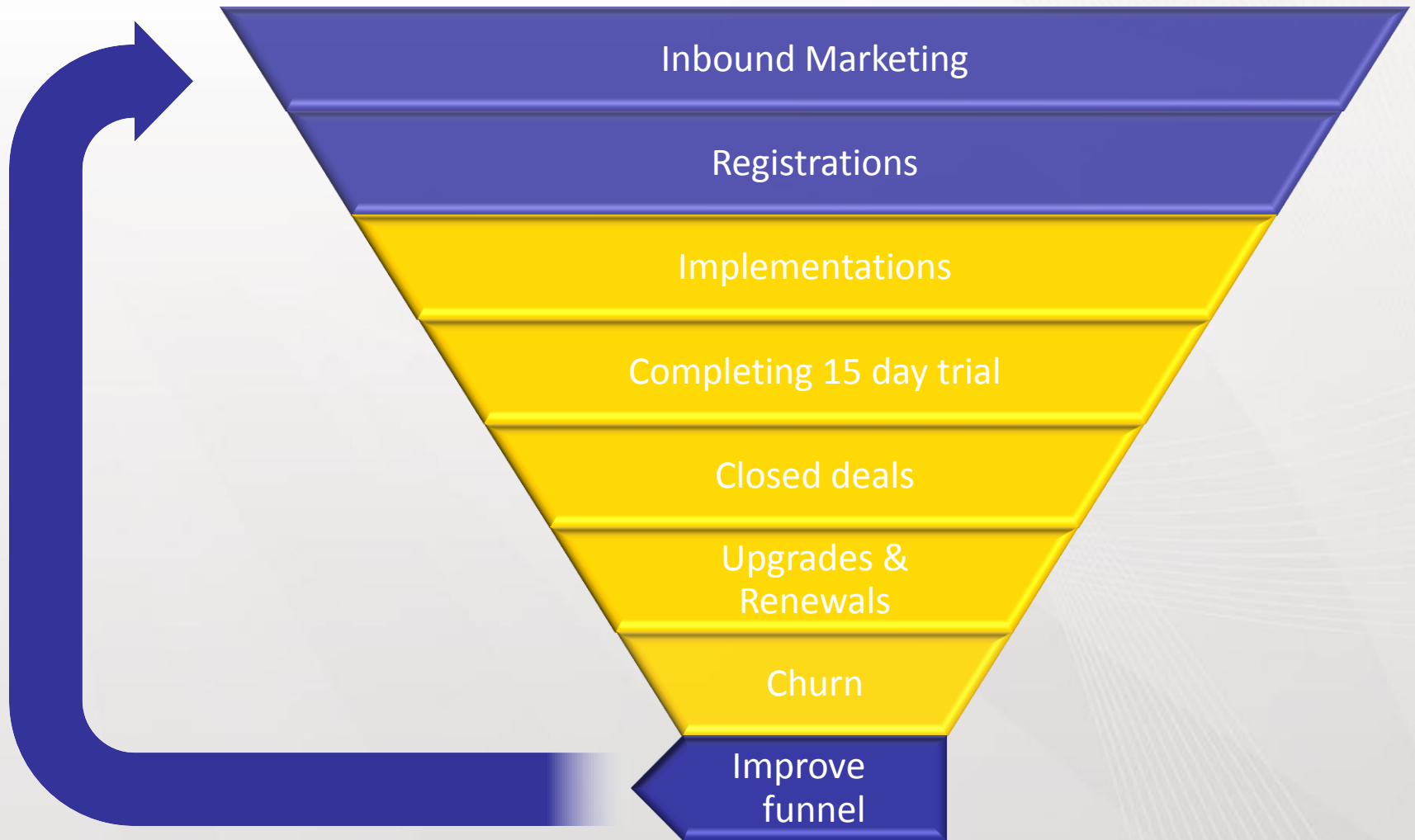
B2B SaaS Company Lifecycle





Where to start? Lead Generation and Lead Nurturing Funnels

Lead Generation & Nurturing Funnel



Building your Customer Service

- Discover your pain points, the reasons and act to reduce them:
 - Look at your data!!!
 - Talk to your customers
 - Listen and Act

It always comes down to:

Customer Acquisition Cost

Phases and Questions to Ask

- Implementations
 - Do we need Customer Service for implementation?
 - Appropriate quality?
 - Appropriate usage?
- Trial
 - Value = ROI
 - # relevant to Upgrades (=Sales)
 - # of Upgrades
 - Why didn't all of them upgrade?

Phases and Questions to Ask

- Upgrade and Renewals
 - # of upgrades
 - % of renewals
 - Why are they upgrading?
 - Why are they renewing?
- Churn
 - Churn is not only controlled by CS activities – understand your Churn!

Understanding the Funnel

Registrations ⇒ Happy Loyal Customers

Questions to be asked...

- How many registrations?
- Which lead sources?
- Automatic, Inside SMB or Inside ENT?
- Why and where in the funnel did we lose the customer?
- When is the correct time to touch the lead in the funnel?
- How should we be touching? Success Manager or Inside Sales?



Support Levels and Company Lifecycle

Free - Support

- **What Level of Support should we offer?**
 - Ensure simple product implementation and ongoing usage
 - Phone number on site
 - Live chat
 - Feedback
 - FAQ
 - Engaging Self-Service
 - Tutorial movies
 - Social networks

Automatic SMB Sales – Support

- Users vs. Customers
- Higher Churn Rates should be expected
- Differentiate between Automatic sales and Inside sales
- Follow the funnel and improve where needed
- Communicate via Marketing

Inside SMB Sales – Hunters Team – Support

- First prove your “go to market”
- Learn from your monthly renewals
- New feature/functionality
- Only then invest in customer service and build the Success Managers team

Inside SMB Sales – Farmers Team

- Quality implementations – by Hunter + Success Manager joint work
- Monthly Renewals – catch them onetime to move to Yearly
- Annual renewals – 3 months in advance contact the customer
- Upgrades – build internal reporting system
- Additional penetration

Inside ENT Sales – Professional Services

- Professional Services from day one
- PS is part of the sales process and the offering
- PS hours and projects
- 1 PS on up to 20 accounts (depending on size)
- Don't be ahead of the curve
 - first sell more then add PS
- Don't be behind the curve
 - PS is essential for your success



Churn and Renewal Management

Churn

- 90% renewal rates:

Are you counting:

- Number of customers, or revenues?
- All customers or only contracts that are up for renewal?
- Failed payments?
- Monthly, Yearly etc. renewals?

Churn

How to calculate:

- **Option A:**

- 100 customers at the beginning

- 20 lost

- = 20% churn / Only 80% renewal rate

- **Option B:**

- 100 customers at the beginning

- 100 new customers

- 20 lost

- =10% churn / 90% renewal

Renewal Management

- Revenue comes from renewals!!!
- Don't leave money on the table
- Sell the service
- Deliver great service experiences every time

Renewal Management

- Data , Data, Data – welcome to...
the big headache!
- CRM, Internal Database, Payment processing
system
- Clean and correct data are critical to the
success of a renewals sales team
- Usage Analytics, Customer Feedback, Account
Management team



Closing remarks

Align your Sales And Customer Services

- Your Customer Service should be considered a “profit center” not a “cost center”
- Farmer and Account managers sit together
- Shared understanding of both departments’ work and goals



Thank You for Your Attention

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