

# TSIA 2021 Technology Summit

## Creating a Strong Relationship Between PS and CS to Accelerate Value Realization

Thank you for joining us. This presentation will begin in just a few minutes.

A few notes while you are waiting:

- Audio: is routed through your PC – please make sure your speakers are not on “mute”
- Technical support: submit a question using the Q&A feature on your console, or contact **Vanessa Lucero** at [vanessa.lucero@tsia.com](mailto:vanessa.lucero@tsia.com)

**John Ragsdale**  
Distinguished VP,  
Technology Ecosystems  
[John.ragsdale@tsia.com](mailto:John.ragsdale@tsia.com)  
[@john\\_ragsdale](#)

- Author of Lessons Unlearned, which chronicles his 25-year career inside the customer service industry
- He spent 10+ years managing both the internal and external customer support organizations for a global retailer
- Professional trajectory: Forrester Research, Clarify, Answer Systems, Platinum Technologies, and Nortel

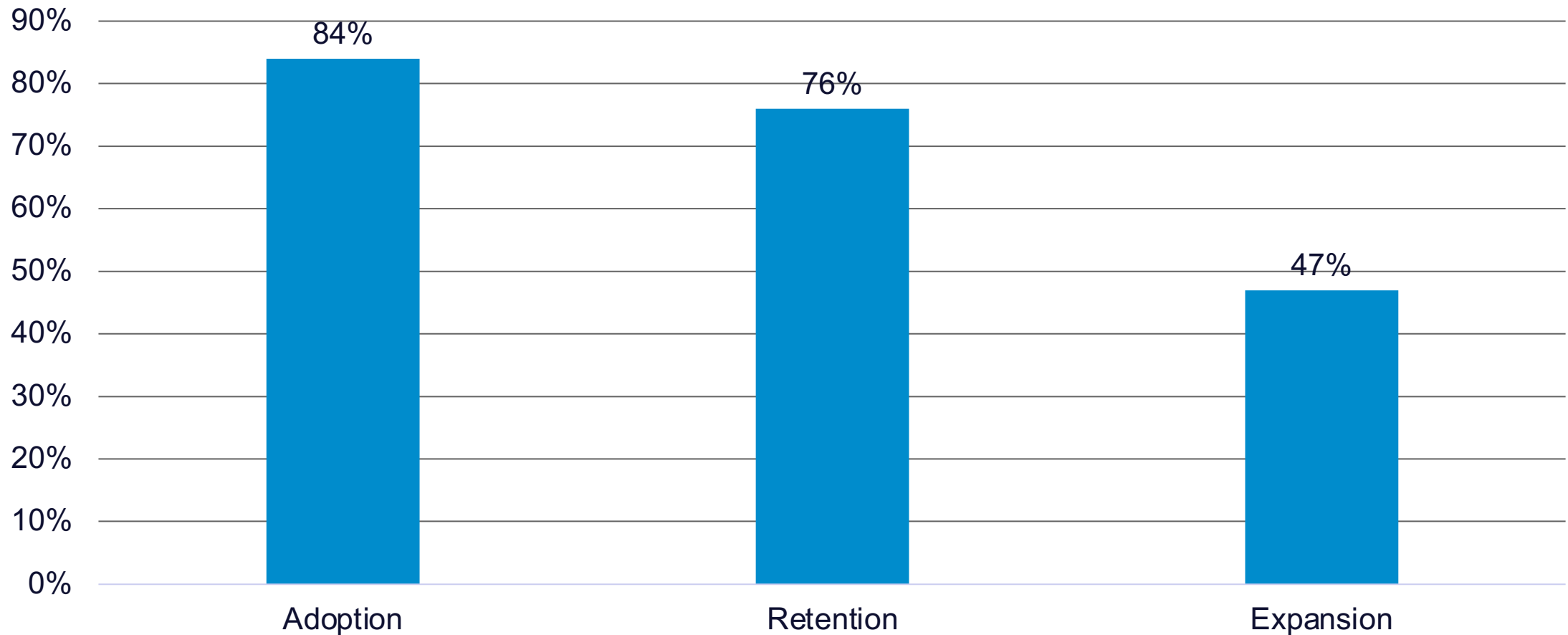


# TSIA 2021 Technology Summit

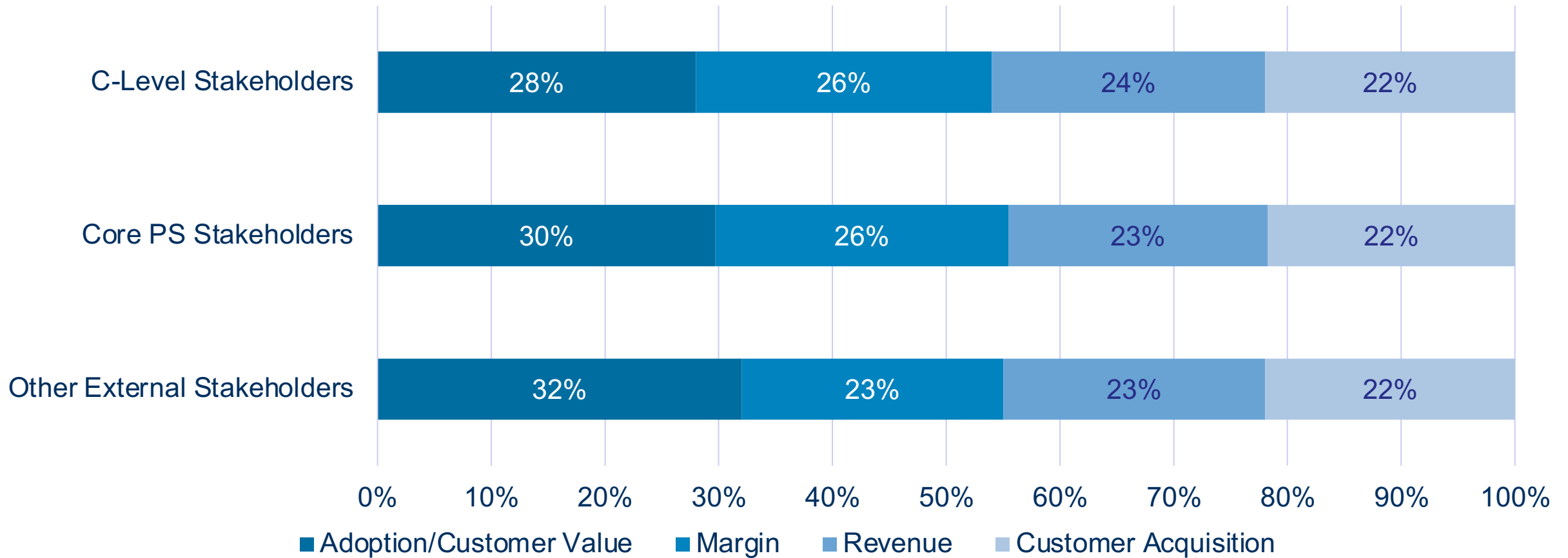
## Creating a Strong Relationship Between PS and CS to Accelerate Value Realization

John Ragsdale | Distinguished Researcher | VP, Technology Ecosystems | TSIA

# What are the charters of your Customer Success Organization?



# The Charter of Professional Services





# Our Expert Panel



**Lori Ellsworth**  
VP, Product Management,  
Professional Services Cloud  
FinancialForce



**Steve Fenlon**  
VP, Customer Success  
Birdview PSA



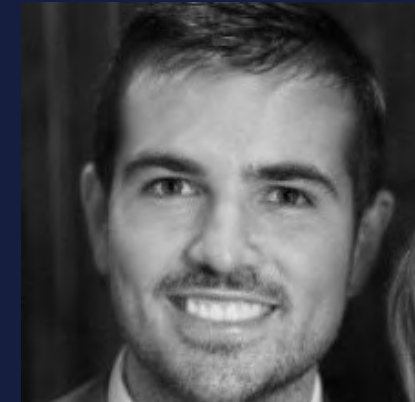
**Peter Fitzpatrick**  
Chief Adoption Officer  
Kimble Applications



**Gayle Lassen**  
VP, Professional Services  
Mavenlink



**Adrian Speyer**  
Head of Community  
Higher Logic



**Easton Taylor**  
VP, Customer Success  
Gainsight

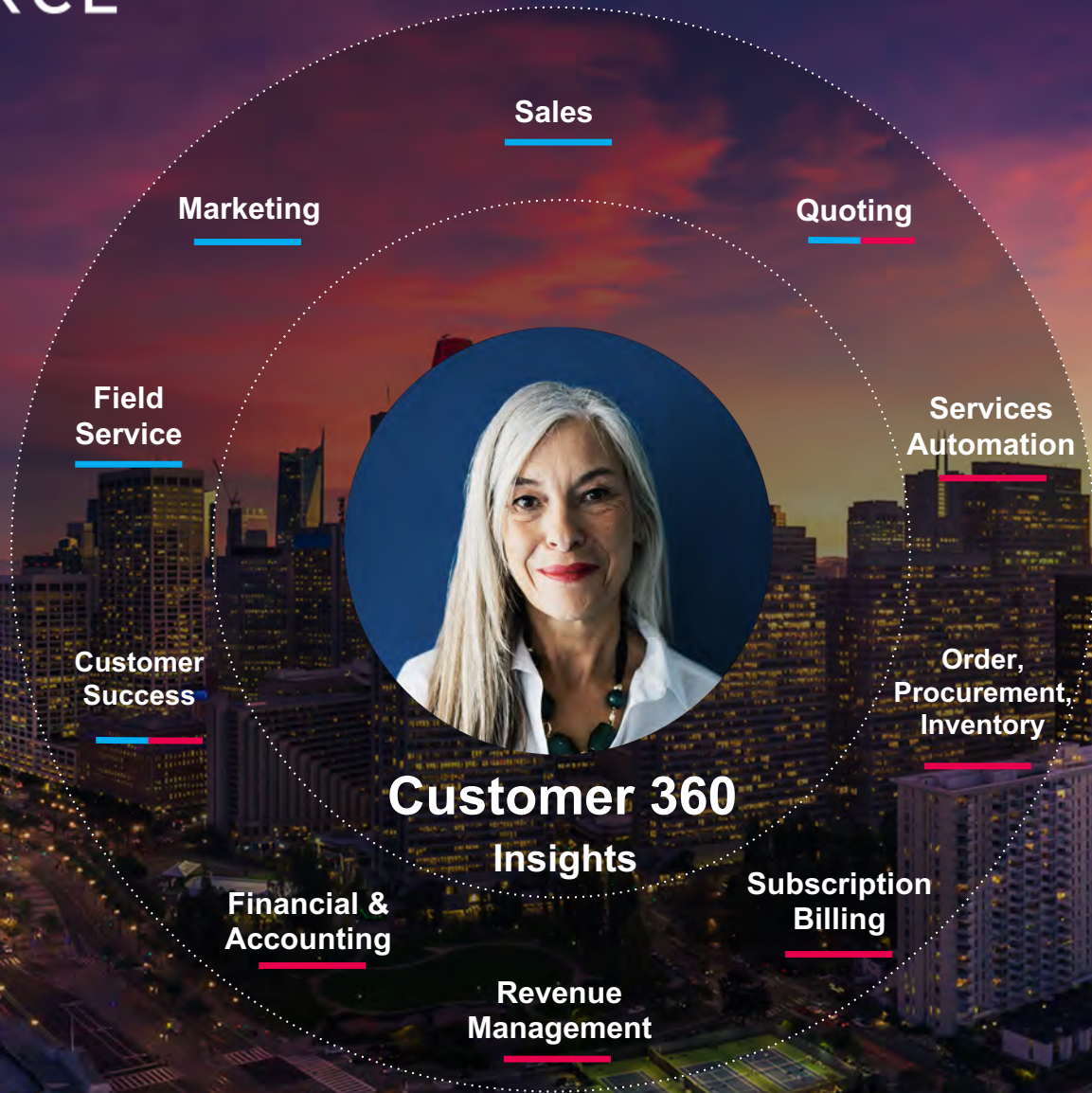


## Lori Ellsworth

VP of Product Management,  
Professional Services Cloud

Lori Ellsworth is Vice President of Product Management for Professional Services Cloud at FinancialForce, leading the team that drives product strategy and direction to deliver value to professional services organizations globally. Lori has been with FinancialForce for six years, and brings over 30 years of business and SaaS software experience. For the last 20 years, Lori has focused on delivering solutions for professional services organizations. She had held a variety of Product Management roles at Compuware, Changepoint, and MKS. Lori holds a Bachelor of Mathematics degree from University of Waterloo and an MBA from Schulich School of Business, both in Canada.









## Steve Fenlon

VP of Customer Success,  
Birdview PSA



steve.f@easyprojects.net

- Steve leads the Professional Services, Customer Success and Technical Support departments for Birdview.
- His team is responsible for every aspect of the customer journey from onboarding to adoption and ultimately to advocacy.
- Steve's team believes deeply in the core tenets of customer success: a shared mutual interest of customers achieving the required outcomes that is proactive and data driven.



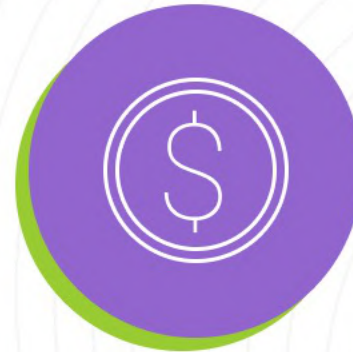
**“Birdview PSA provides professional services organizations with a single source of truth for their Projects, Resources and Finances”**



**Ease of use**



**Implementation**



**Value**

## Peter Fitzpatrick

Chief Adoption Officer  
Kimble Applications



- ▶ Over 20 years experience in consulting and professional services
- ▶ Joined Kimble in 2013
- ▶ Prior to taking on Chief Adoption Officer role, was Chief Implementation and Business Transformation Officer at Kimble

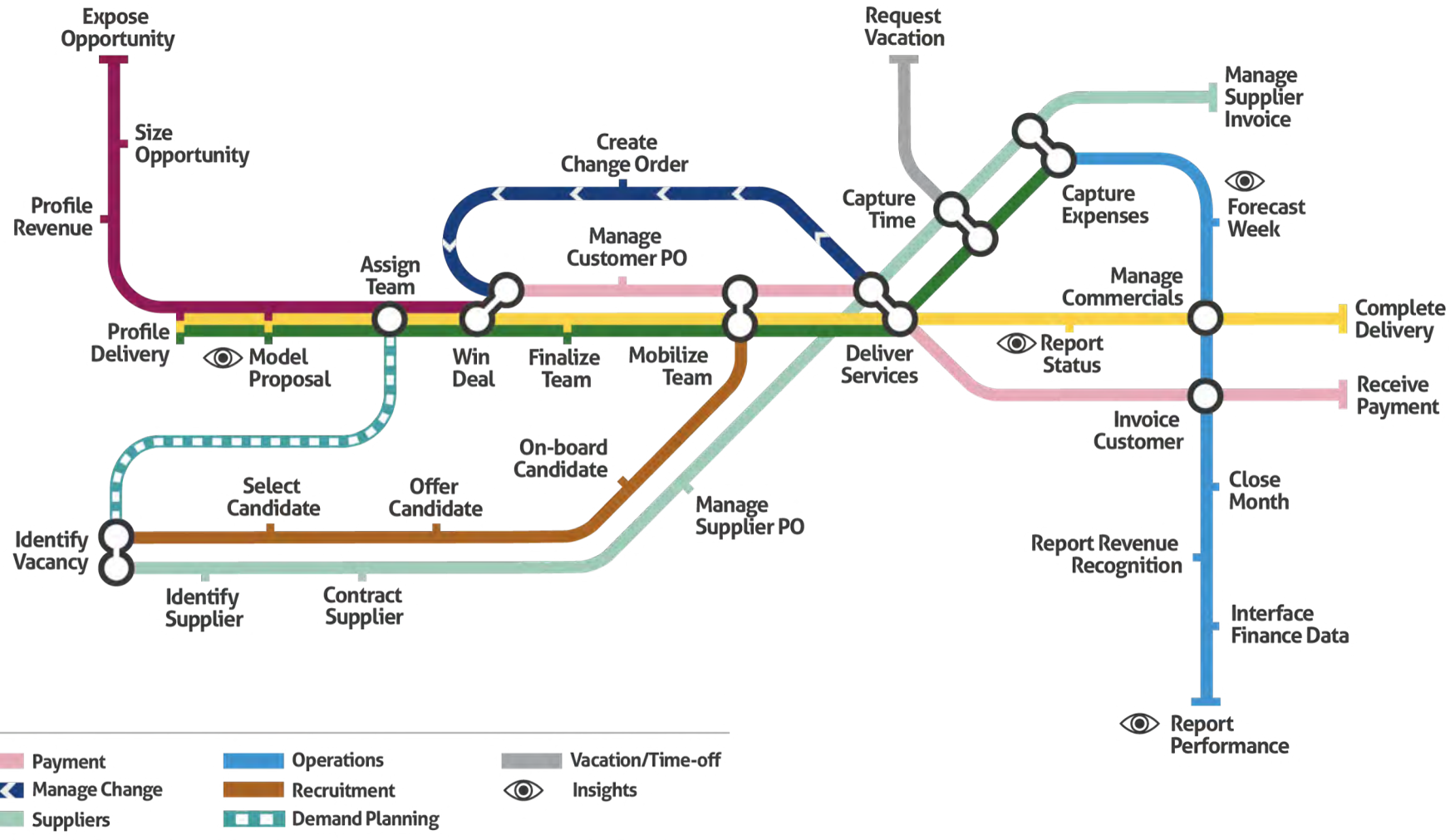
# KIMBLE

- ▶ Kimble's Professional Services Automation (PSA) software helps services organizations make better decisions sooner, increasing customer satisfaction and optimizing resource utilization, profitability, and business scalability
- ▶ Kimble offers comprehensive out-of-the-box functionality covering project scoping, resourcing, project management, billing, revenue recognition and more
- ▶ And it does it all on the world's leading CRM platform, Salesforce, giving businesses a unified solution that makes service delivery more predictable, more profitable, and more efficient



# The Kimble Subway Map

Aligning Teams around Processes That Lead to Consistent Customer Success





# Gayle Lassen

VP, Professional Services,  
Mavenlink

## EXPERIENCE

- Professional Services & Education Services executive with 2 decades of software industry leadership experience.
- Mavenlink, Global VP Professional Services
  - Established Mavenlink's Enterprise PS practice and Boston Mavenlink office
  - Leads Mavenlink Education Services team
- Kofax, Director PMO & PS Operations
- 170 Systems, Senior Mgr PS & Education Services



# INDUSTRY CLOUD FOR PROFESSIONAL SERVICES™

Purpose-built technology with a resource-first architecture  
that puts people at the core





The Mavenlink Industry Cloud for Professional Services is purpose-built for professional services organizations, overcoming long-standing technology shortcomings. Mavenlink helps services leaders **reach new levels**





## Adrian Speyer

Head of Community &  
Lead Evangelist @higherlogic

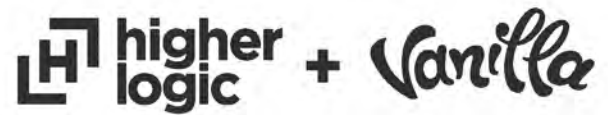


@adrianspeyer

## *who is* **higher logic?**

### **Better Together. All Together.**

Delivering powerful online communities and communication tools to engage members and customers at every stage of their journey.





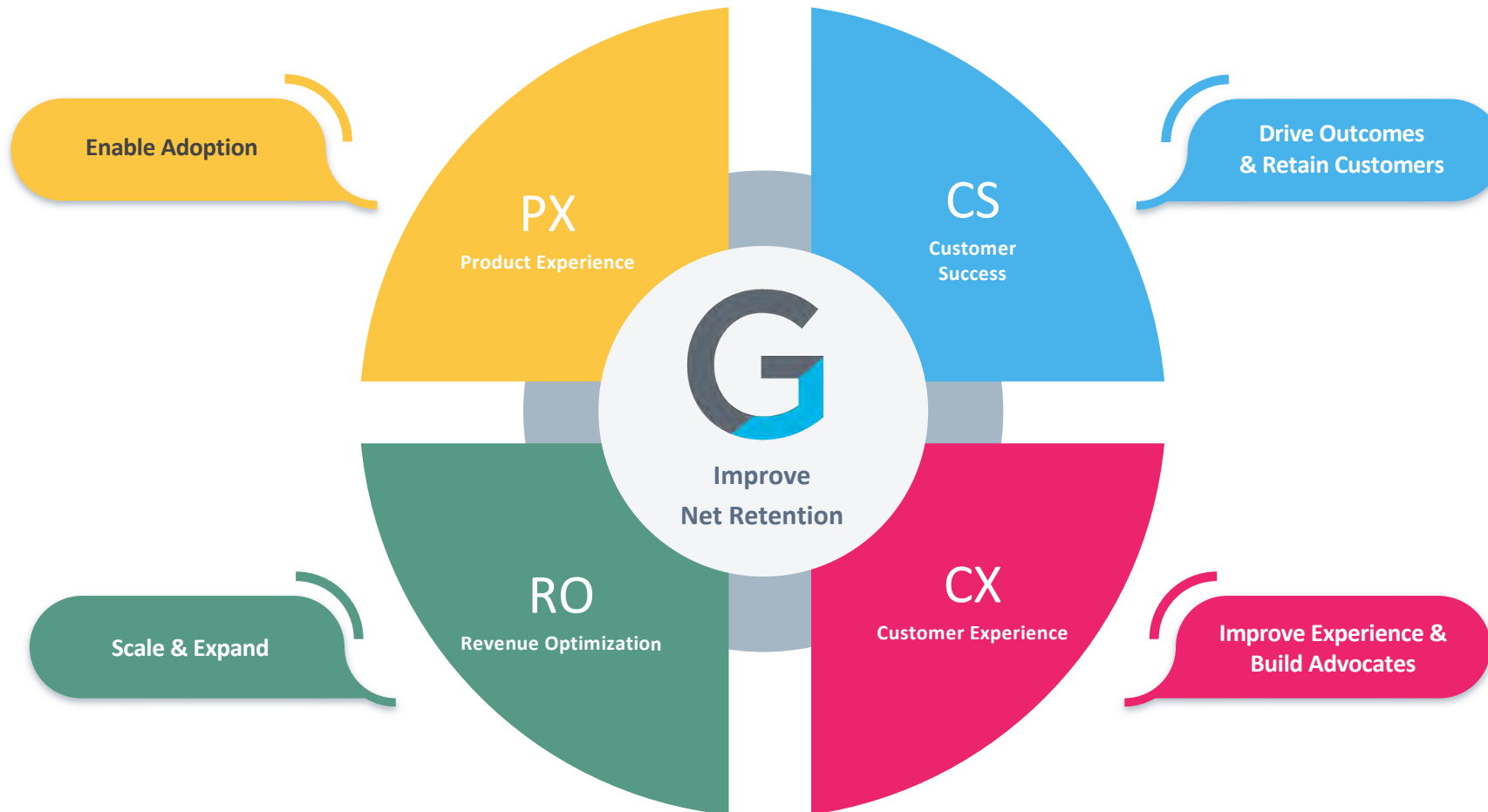
# YOUR SPEAKER

- Based in Charleston, South Carolina
- A husband and father of two children, Beckett (4) and Isla (9 months)
- Outside of family and work I enjoy playing tennis, the guitar, and boardgames.
- Been with Gainsight for six (6) years in a variety of different roles.
- Had the opportunity to build out our CS efforts in London for our EMEA customer base.



**Easton Taylor**  
*Vice President of Customer Success*

# ABOUT GAINSIGHT



# Our Expert Panel



**Lori Ellsworth**  
VP, Product Management,  
Professional Services Cloud  
FinancialForce



**Steve Fenlon**  
VP, Customer Success  
Birdview PSA



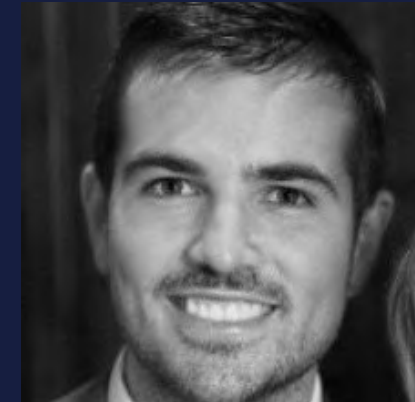
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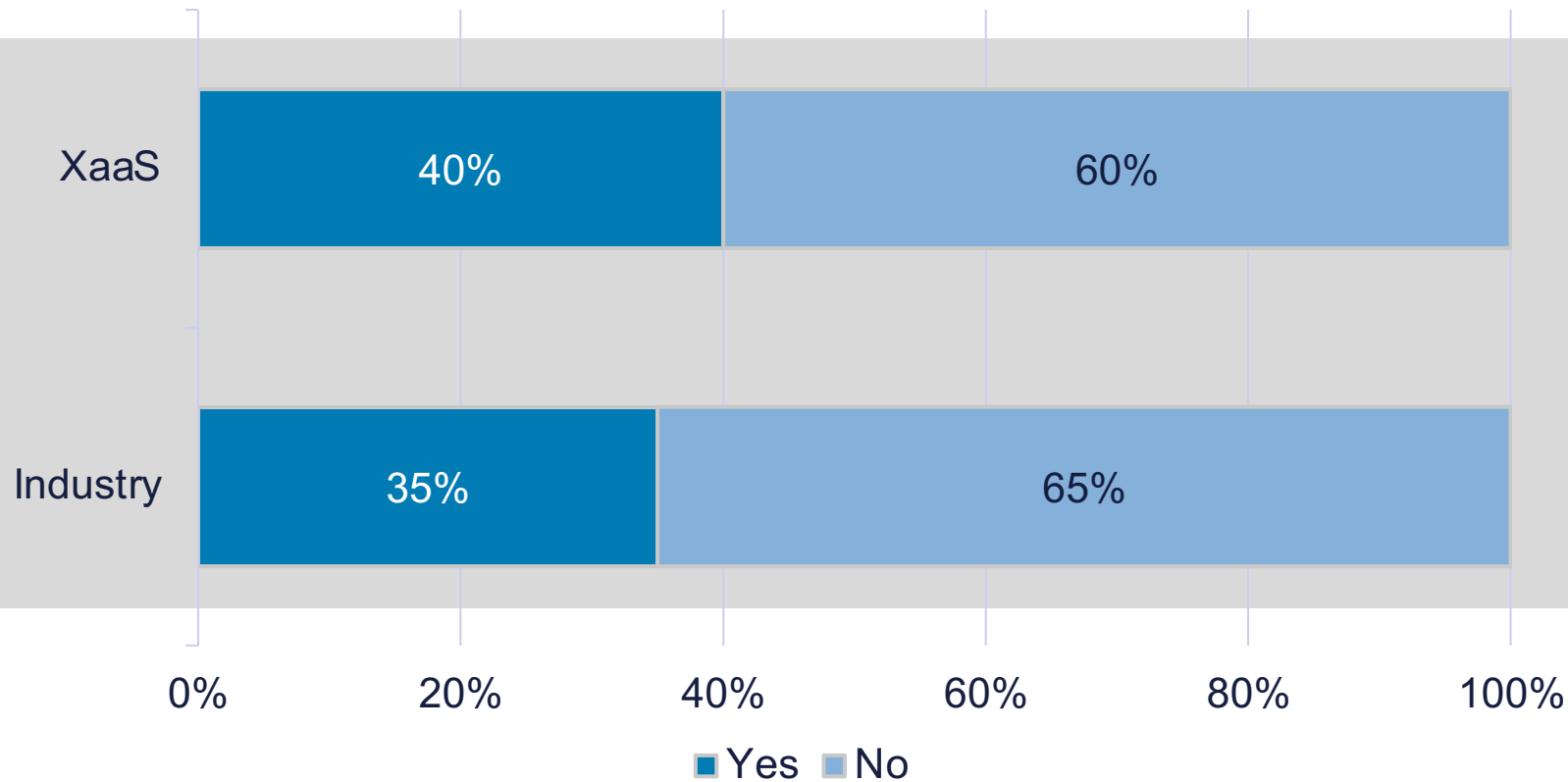


**Easton Taylor**  
VP, Customer Success  
Gainsight



# Delivering Value vs. “Launch and Leave”

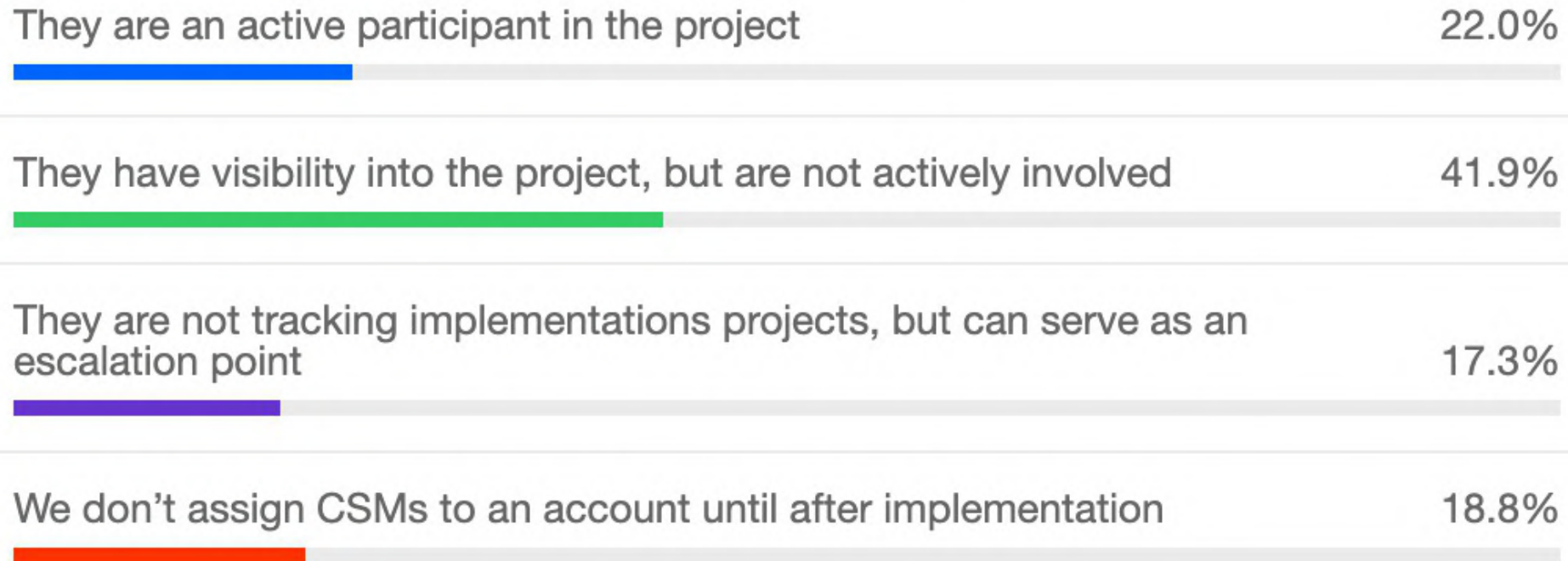
Do you have a methodology for developing PS offerings that are intended to increase adoption of products by existing customers?



**Implementations  
must take a different  
focus when the goal  
is accelerating value  
realization**

# Live Technology Summit Poll Results

What is the CSM's role in implementations at your company?



# What is the CSM's Role in Implementations?

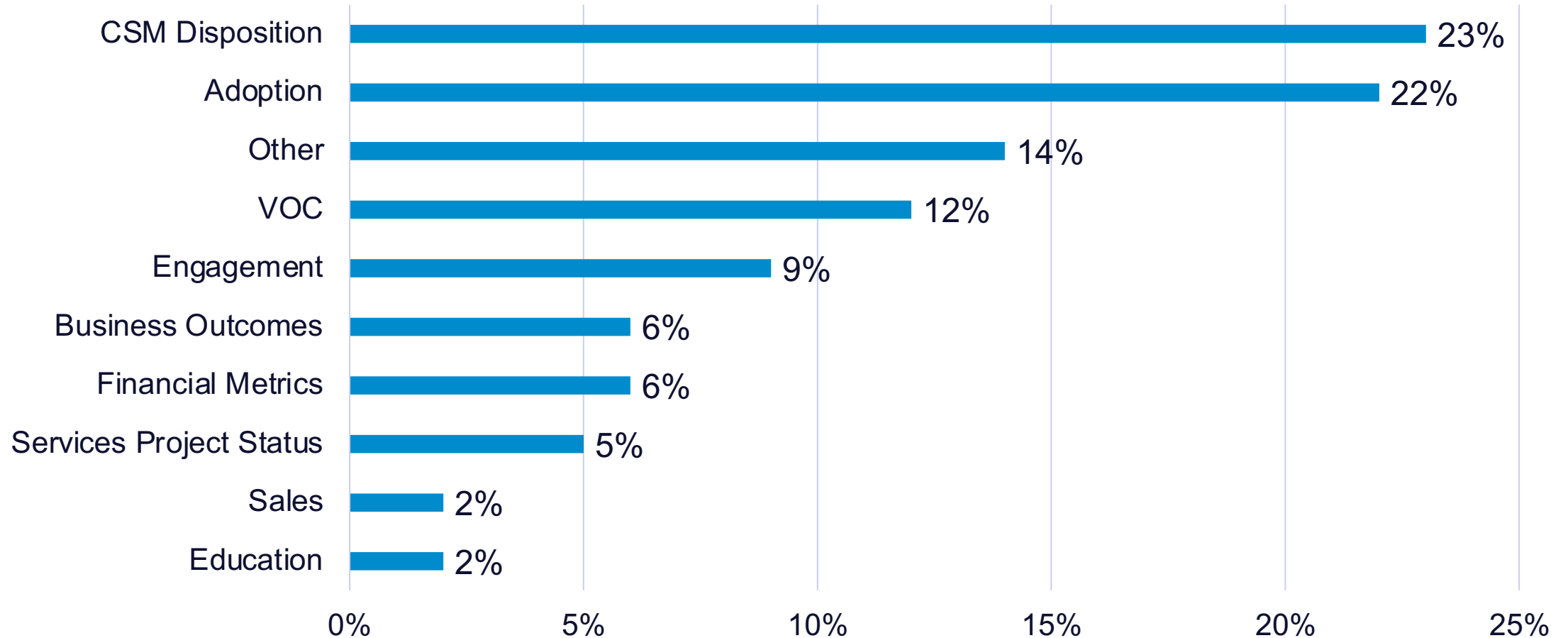


**70%**

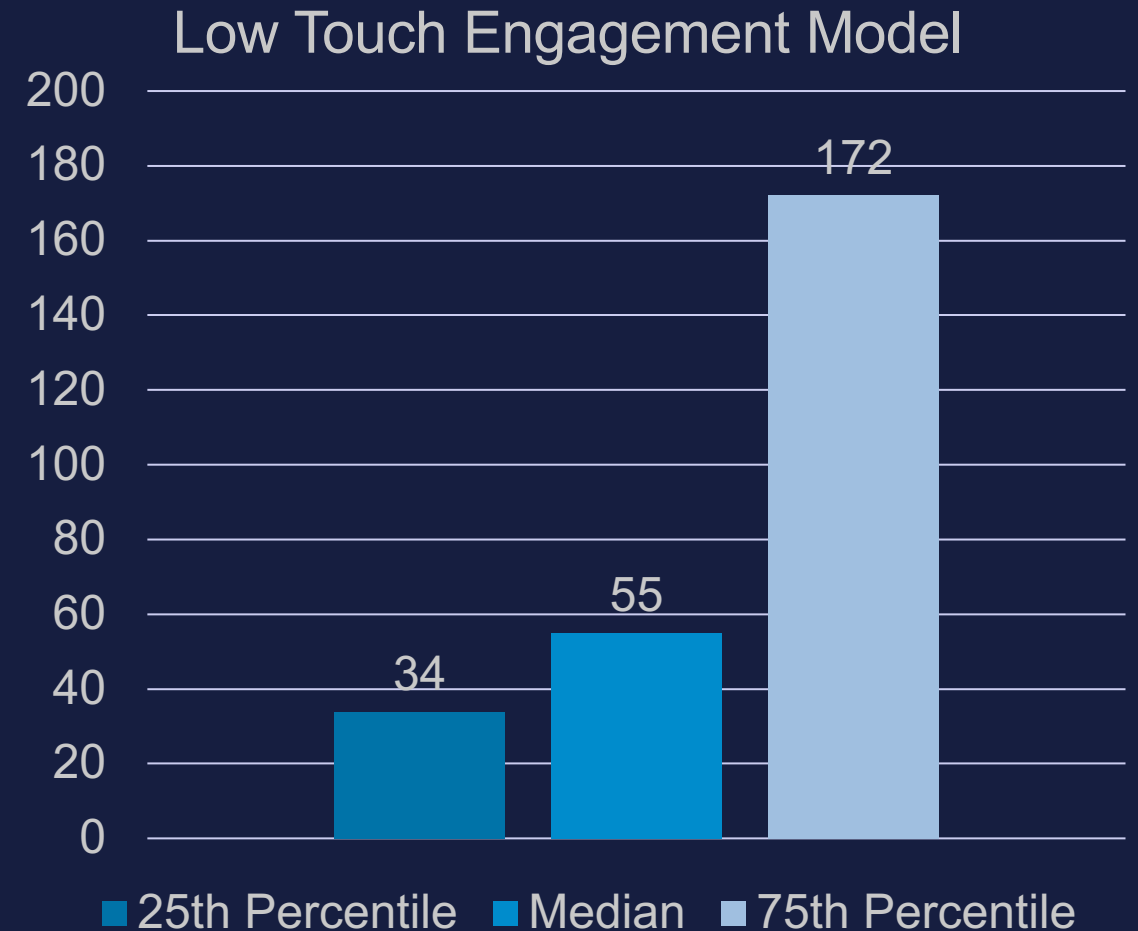
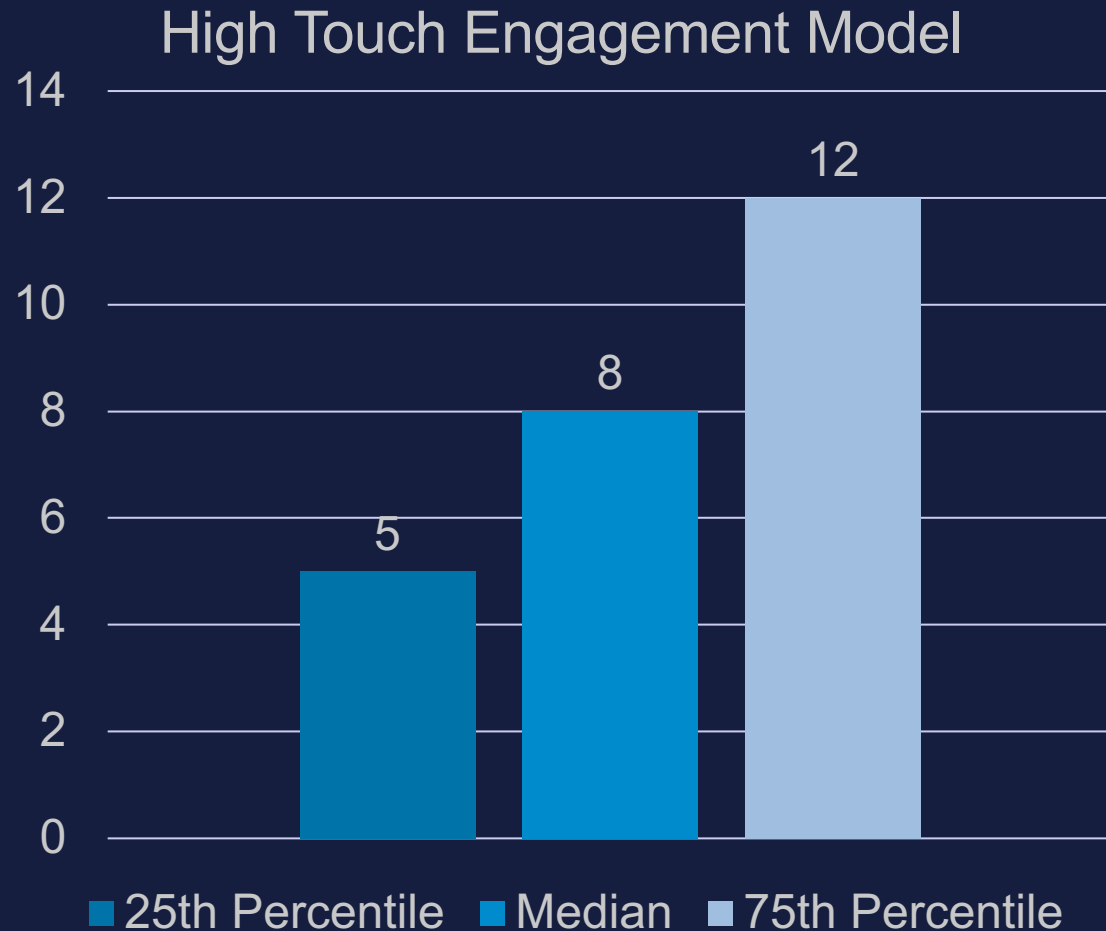
**of companies have CSMs  
engage with the customer either  
before or immediately after  
contract close**



# What portion of the Health Score is dedicated to the following:

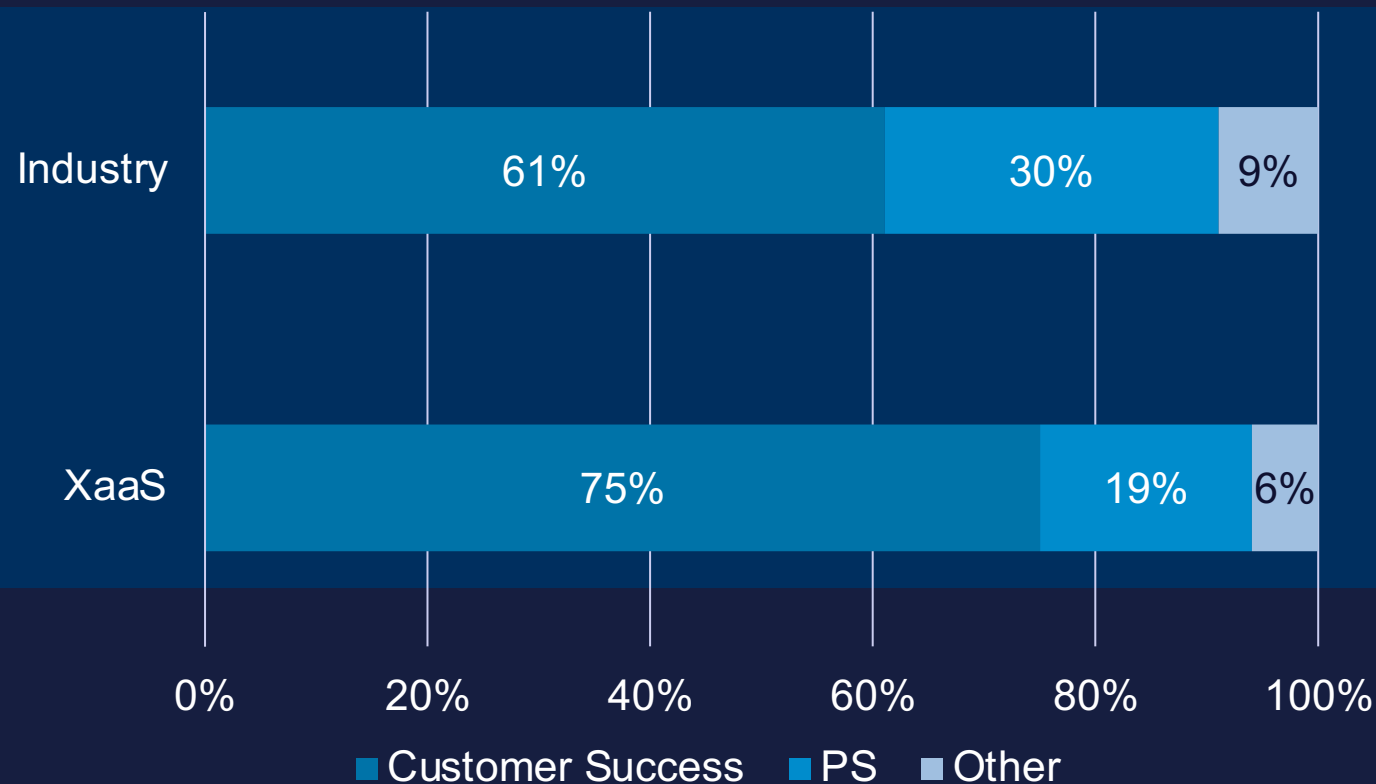


# Account to CSM Ratio: High Touch v. Low Touch



# Who Owns Onboarding?

Who has the primary responsibility at your company for customer onboarding?



**Customer Success is increasingly taking ownership of onboarding**



# Live Technology Summit Poll Results

Who is the primary owner of customer onboarding at your company?

Customer Success 23.0%



Professional Services 61.2%



Education Services/Customer Education 3.0%



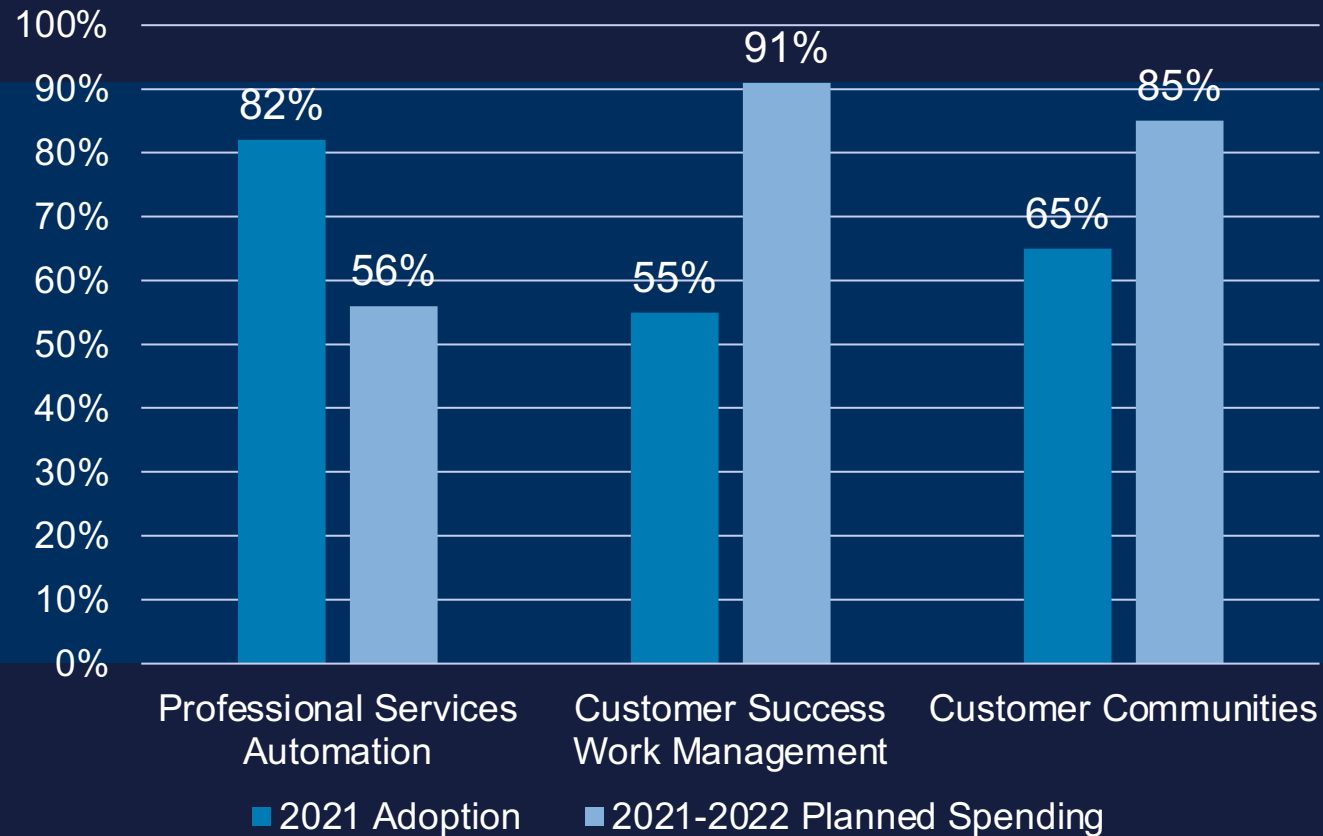
Sales/Sales Engineers 6.7%



Other 6.1%



# Technology Adoption and Planned Spending



**Though 82% of companies have a PSA system in place, 56% are planning an additional investment in 2021-2022**

# Who Is Delivering For-Fee CS Offers? Is It A Scalable Business?

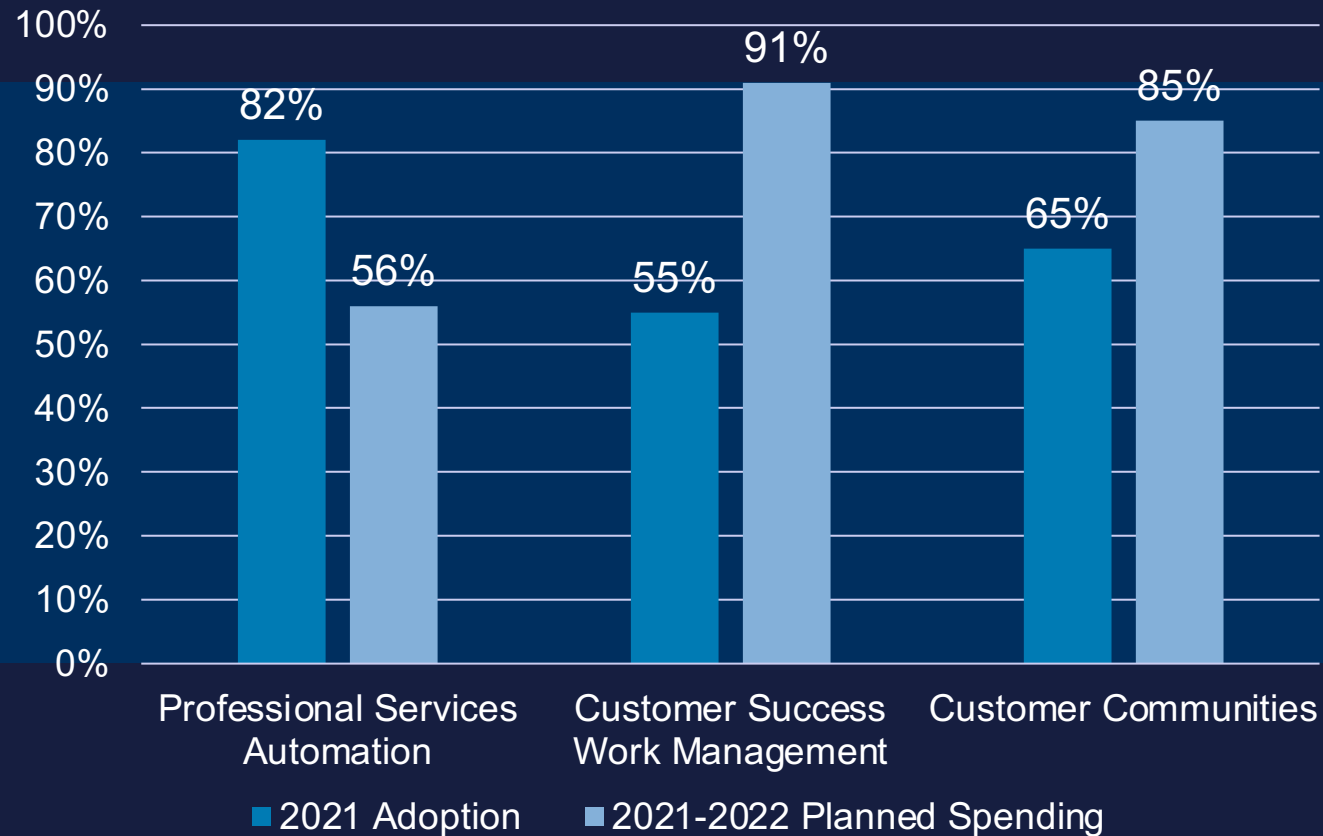
**38%**

**of companies have fee-based Customer Success offerings**

**21%**

**of companies measure gross margin for monetized CS offers**

# Technology Adoption and Planned Spending



**Though 82% of companies have a PSA system in place, 56% are planning an additional investment in 2021-2022**



# How is Services Convergence Accelerating PS and CS Collaboration?

## Big “C” Customer Success Organization



- **69% of companies see an overlap in their services portfolio**
- **45% of companies have an approach to chargeback resources across different service lines**
- **75% of companies are actively pursuing initiatives to find cost synergies across existing service lines**

From “The Case for Services Convergence and Big “C” Customer Success”

# Live Technology Summit Poll Results

Where is your company on the journey to service convergence?

Fully converged with resource sharing across departments 8.2%



Our service teams are all under one executive, but functions/resources are not merged 41.8%




We've started to do more collaboration across groups, with some consolidation planned in the future 37.7%



Our service organizations are very siloed with no plans for convergence 12.3%





# Q&A



# THANK YOU

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