



Customer Success in the Age of Data

Partnering with Customers for Mutual Success

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Center for Services Leadership

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Executive Summary

The definition of Customer Success is simple: it occurs when customers achieve their business goals using your product or service.

Partnering with Customers for Mutual Success

Customer Success (CS) is a new concept helping companies find ways to retain customers and

maximize revenues in a business environment characterized by big data, changing modes of consumption and new business models. The definition of Customer Success is simple: it occurs when customers achieve their business goals using your product or service. That may seem self-evident but encapsulated in those words is an imperative to revolutionize your customer relationships by looking at your company while standing in your customers' shoes. From their perspective, are you truly focused on assuring that your product is helping *the customer* succeed? Is your organization doing everything it can to make that happen? Answering yes to those questions will mean understanding your customers' experiences with your organization as well as your product, then tailoring your responses to benefit the bottom line: the customers' and your own. As you become a dynamic partner, with your customer's success in the foreground, your company will realize new levels of success as well.

What You Will Learn

This white paper reports on a seminar for member companies of the Center for Services Leadership Advisory Board. The event was hosted by State Farm at its hub in Tempe, Arizona. Participants learned about the market conditions and other trends that make Customer Success Management an effective tool. The group took a fresh look at the customer journey and the role of data in gaining insights into customer behavior. Successful CS implementation poses challenges: managers and executives in attendance discussed the ways they are finding solutions to those challenges in their companies right now. Look for Thought Balloons throughout the paper, delivering key learning points gleaned by participants. More information on the Center for Services Leadership Community of Practice on Customer Success and to join the community, see the end of this whitepaper.

Speakers

Richard Owen, founder and CEO of OWEN CX Group, and Shreesha Ramdas, co-founder and CEO of Strikedeck, were the keynote presenters, providing a high-level view of the evolution of Customer Success Management and information about best practices for deploying technology for CS. Executives with responsibility for Customer Success at Center for Services Leadership Advisory Board firms shared their experiences during a panel discussion. They included Michelle Cirocco, head of global marketing at Televerde; Michael Hargis, senior vice president, global consumer services and sales, Symantec; Suraj

Mohandas, vice president, customer success, Spear Education; and David Prus, assistant vice president—customer care center, State Farm Mutual Automobile Insurance Companies.

Community of Practice on Customer Success

The meeting summarized in this whitepaper highlighted the strong interest in Customer Success within the Center for Services Leadership community. Among the center’s member firms, Customer Success is a vibrant topic that encompasses many aspects of dealing with customers: customer satisfaction, customer loyalty, Net Promoter Scores, customer success, customer relationship management, customer analytics, call center management, employee incentive structures, customer-focused operational excellence and many more issues.

In response, the Center for Services Leadership has formed a Community of Practice on Customer Success. The community is open to all member firms and includes any member of your organization who would benefit from participation in community events: your board member, your liaison and your subject matter experts. The community of practice model enables your organization to benefit from best-practice sharing among Center for Services Leadership member firms and gives you access to Customer Success thought leaders as well as industry experts outside of the network. If you are interested in joining the Community of Practice on Customer Success, please send an email to thomas.hollman@asu.edu.

Center for Services Leadership

The Center for Services Leadership is a groundbreaking research center within the W. P. Carey School of Business at Arizona State University which combines the latest scientific insights from the academic world with the best of service strategy in the business world. The center was created in 1985 as a response to a unique set of challenges facing companies at a time when sources of revenues were beginning to shift. While others were focusing on products and manufacturing enterprises, the Center for Services Leadership pioneered the study of service. Today, the center is a globally recognized authority and thought leader in the science of competing strategically through the profitable use of service. We encourage you to connect with the Center for Service Leadership by visiting wpcarey.asu.edu/csl for information on research, in-person and online executive education, and corporate membership opportunities.

CUSTOMER SUCCESS: THE EXPERTS' VIEW

Defining Customer Success

Just when did the words “customer success” become a proper name? Customer Success is a hot new topic in the services space, but the first CS teams were formed 20-odd years ago, in the enterprise software sector. As enterprise software evolved into Software as a Service (SaaS), the idea of CS grew as well. Bumpy implementations, expensive maintenance, customer churn and a disappointing lack of customer advocacy drove its development. But, the idea that CS is an SaaS phenomenon only is a myth, says Shreesha Ramdas, founder and CEO of Strikedeck: “All companies want to create customer happiness.” Recently, CS has emerged from the technology sector to become a useful tool for virtually all companies.

But why is interest spiking now? Business models are changing, as are consumption patterns, and running through it all is a river of data that can yield change-driving insights.

Clients buy outcomes and results, not products.

1. What customers buy

Once considered a cost of doing business, service is now a profit center as companies monetize their traditional service offerings and develop new types of service. Firms are learning to

build tiers of service, from economy-priced automated support to call center services to concierge relationships with high value customers.

Examples abound in the business-to-business sector, which has been transformed by the development of service strategy. In addition to products, customers are also buying expertise, hands-on service or even wholesale take-over of some part of their process. For example, a company that manufactures and sells industrial valves may offer a service that monitors the valve and performs proactive maintenance. Further along the continuum, some companies are providing services that satisfy the customer’s business requirement as well as the needed product.

Wolfgang Ulaga, Professor of Marketing at INSEAD, Europe Campus offers the example of Michelin: customers can now buy a service rather than outright buying tires. Michelin manages tires for the fleet, providing maintenance and replacement when necessary. This is the end of the continuum: a supplier that steps in and takes over part of its customer’s process, such as the paint company that operates a customer’s paint shop rather than just supplying the paint. These relationships are based on performance- and solutions-based contracts. Built in is a new reality that providers are assuming some degree of responsibility for the success of their customer’s businesses.

2. How customers buy

“Change to a consumption model.” Driving these new business models is a shift in the way individuals and businesses consume products and services. Ride sharing services are a good street-level example in the consumer sector, says Richard Owen of OWEN CX Group. When passengers call Uber, Lyft or another similar company, they are renting a ride, forgoing the capital investment of an automobile at least for an evening. For some demographic groups, notably young people, ride sharing means they don’t have to invest in an automobile at all.

3. The role of data

“Understand the peak and the end of a customer journey, because the rest may not matter as much. Where are you losing It may not be where you think you are.” These trends are enabled and propelled by a swell in data. At every point along the customer journey, data is collected — data that can be leveraged not only to acquire new customers but also to retain them. And in this new world, customer retention is increasingly critical to success: customers who are happy are those who are succeeding, and if they can see that your product or service contributes to that success, they stay for life. Customer Success management reduces churn, Ramdas points out, opening up the possibility of “hockey stick” financial growth and a customer base that helps you grow through positive word of mouth.

How to Adopt a Customer Success Strategy

Adopting a Customer Success strategy is a complex undertaking requiring the firm’s leadership and employees to look at the company and their roles in a different way. It’s not as easy as cooking up a new job description and calling it a day. Here are some of the key issues to tackle as you work on shifting to the Customer Success approach.

Define four to five operational measures and focus on them.

1. Beware the hyperbolic discount

“Focus on the long term investments versus short term investments.”

Owen says the financial models in most businesses are biased for short term returns — what he calls the hyperbolic

discount — but reaping the financial returns resulting from a Customer Success strategy requires long term investment. This can be difficult for leaders to do, Owen said, because investments that lead to Customer Success take three to five years to pay off.

2. Reconsider the customer journey

“Put the customer at the center of your business.” Many businesses organize around products, Owen says, but Customer Success focuses on the customer: his/her experiences with products. That means re-examining the customer journey from the customer’s point of view.

Businesses strive to deliver excellent service at every point along the way, but customers are not really looking for that, Owen said. “No customer ever says the product I buy is lousy, but the service is great.” Customers want a great product, but they aren’t looking for continuous spectacular service: they want “good enough” service overall, and they will form an opinion based on the overall experience. *“Focus on the customer’s experiences.”*

But along the journey are mileposts that play a critical role in forming the customer’s perception of your service. The customer’s first contact with the product will be remembered, Owen explained, so make it as good as the packaging of an Apple product or the opening scene of the first Star Wars movie.

“Review the first 60 days experience.” At first contact, customers will compare what they get with their expectations. A rocky experience at this stage is difficult to overcome. *“Map and document the customer journey on a continuous basis so you can identify the customer’s peak points and act on them.”*

After that there will be “moments of truth” for your company’s performance. Use data to discover what those are and to review your customers’ experiences. These high points may be different depending on the customer, however. In order to move Customer Success in an engagement, dedicate resources in those places, Owen advised.

3. Build customer lifetime value

“Make sure you are attracting the right customer.” The adage “any customer is a good customer” is false, Owen said. The customer you want is the one that stays with you, creating lifetime value for your company. Financial return is linked to long term relationships because there are no new customer acquisition costs,

upgrades are frequent, and long-term customers are more likely to accept higher pricing.

Find the right measurement of customer satisfaction and correlate it to customer success and profitability.

Ramdas pointed out that some companies believe that a great product offering excuses them from working on Customer Success. “Customers are not

in business to use your product,” he said, and no matter how great the product is, it will take at least 21 days for customers form new habits using it and to experience results. Your job is to get them there.

Customers who are generating the most income, have stayed with you the longest and act as advocates in the world are the customers companies should work to retain. This might mean realigning your organization internally, but the disruption will pay off, Owen said. Only a small number of companies have re-engineered their organizations to focus on customer value, he said, and they have reaped high financial returns. “The reverse is also true,” he added.

Keep it simple: Measure what matters to customers, once you determine what that is.

4. Get the right data

“Data is dynamic, so understand that what you need is to measure changes over time.”

Data and metrics will identify which of your customers are the most valuable, but you must be sure you are getting the right data and interpreting it correctly.

Don’t assume that your customers will tell you what they think of your product, Ramdas said: “They change their minds and they are erratic. You need a good way to measure how they feel.”

Surveys are no longer the best source of customer insight, added Owen. Data that shows customer behavior as they progress through their journey with your product will reveal more accurately than a survey what they think. In fact, he added, if you have the right data, interpreted correctly, you can predict what a customer will do without asking.

PROFESSIONAL PANEL: NOTES FROM THE FIELD

A panel of industry leaders talked about Customer Success efforts in their companies and traded insights with each other and the audience. Participating were:

- Michelle Cirocco, Head of Marketing, Televerde
- Dave Prus, Assistant Vice President Customer Care Center, State Farm
- Suraj Mohandas, Vice President, Customer success, Spear Education
- Michael Hargis, Senior Vice President, Member Services and Business Operation, Symantec

Customer Success Profiles



Restructuring to Focus on the Client Experience

--Michelle Cirocco, Televerde

In 2011, during a company restructuring, Michelle Cirocco launched a Client Success unit charged with being “more disciplined about focusing on what’s most

important to clients.” Achieving that goal is “a marathon, not a sprint,” she said.

Televerde’s Client Success team was assembled from various departments within the company, bringing together everyone who had been involved in delivering the customer experience. Under executive leadership, the department was

given autonomy so that it would not be overly influenced by sales or operations. The staff of 45 includes client success managers, project managers and those involved in reporting, analytics and systems that support the customer. Cirocco said that client success is “a result.” Team members are evaluated on their ability to deliver “measurable value for clients.”

To assure that all units have a stake in customer success, goals for the new department were designed to overlap with sales and operations. Goals shared with the sales department are related to account growth and retention; with operations, the shared goals relate to profitability, customer success and measurable value for the customer.

Results have been positive. Customer success scores have been over 90 percent annually, and the company’s Net Promoter Score went from 42 to over 60, Cirocco said. Growth and retention of the top 20 customers has been at 90 percent.

Given the diversity of clients that the company serves, ranging from startups to big technology firms, “it’s a challenge to develop a delivery model that’s scalable for the small and medium sized customer,” she commented. In the last year the team has created what she called “greenhouses” for those businesses, where “we would grow the customers with the goal of moving them from the greenhouse out to the farm.” The team is still looking to develop a model that can be scaled down from an enterprise level to serve those firms, she said.



Building Great Customer Experiences in a Complex Environment

--Dave Prus, State Farm

Dave Prus was working in customer care at State Farm eight years ago when he proposed that the 96-year old organization create its first chief customer experience officer. He was named to the job and is now responsible for five customer care centers which field 15 million phone calls per year about everything except claims (which is a different unit). State Farm has 28 million customers served by 70,000 independent agents and their staffs, supported by another 70,000 who work for the corporation. “We’re proud of the longevity of our customer relationships and we’re proud of our market leadership,” he said. “Our differentiator is the

relationships our customers have with our agents, and that we have lots of other channels they can use.” The culture of the company, Prus added, dictates that no one unit owns the customer experience: it is the responsibility of all.

The company’s goal is to make it as easy as possible for customers to do business with State Farm, when and how they want. The front line is the network of agents, and a large part of their compensation is based on customer retention, Prus said. Customers also have access to digital tools. The phone is the third channel, answered at the customer care centers. Winning in the centers, Prus said, is defined as first call resolution. During a tour of State Farm’s hub, meeting participants witnessed a huddle: a regular meeting of call center managers conducted standing up in a common area, where they discuss performance

goals and achievements. Huddles are one way that State Farm assures that the focus remains on customer service trademark: Remarkable, defined as an experience that is personal, caring and simple.



Customer Success in the Education Sector

--Suraj Mohandas

Spear Education provides educational resources to dentists, focusing on clinical and business skills. “Our definition of customer success,” Mohandas said, “is to make sure a dentist has everything, clinically and from a business point of view, to run a successful practice.”

Spear offers services that teach dentists how to take care of patients chairside and run a sound business. Offerings include an online program and small study clubs moderated by specialists. Another service connects up-and-coming dentists with experienced dentists who coach and mentor them. Spear’s practice management solution operates like a consultancy, addressing the pain points in the front office. Products are managed by teams of member success specialists.

Last year the company hired a chief data officer and a CRM platform is making it possible for the first time for everyone in the company to see the same information about customers in real time.

About three years ago, Spear became a subscription-based service, and Mohandas was brought in to manage the transition. He doubled the customer care staff from 25 to 50, and has found that training is a challenge in a business like dentistry where the learning curve is steep. His priority is to build the organization that can scale as subscriptions increase.

Among the challenges has been “wrangling” Spear’s 10 years of loosely-managed data. Spear is working with Strikedeck to organize the data and begin to “discern insights from noise,” Mohandas said.

Getting the data cleaned up is an essential first step, Mohandas said. “Slapping a system on top of bad data or processes is not going to be salvation — it’s probably just going to make it a more sophisticated mess,” he said. With better data, the company was able to decide on a short list of metrics and adapt tools to track them.



Consolidation and Culture Change

--Michael Hargis, Symantec

Symantec bought Lifelock about a year ago, and the new company is currently engaged in consolidation, said Michael Hargis, who leads member services and operations. “It’s been quite a journey,” he said. The process has crystalized the

company’s mission: to create effortless experiences and lifetime value.

One aspect of the consolidation is unifying the perspective on the customer. Symantec was used to selling antivirus software in a box, Hargis said, a transactional model. The new company focuses on memberships, where profitability is linked to recurring revenue and retention rates.

The company has some 44 million customers and products that range from \$29.99 Norton security to a \$350-375 LifeLock service, Hargis reported. Tier one support is provided by 3,000 agents proficient in 23 languages, working in 18 centers (down from 40 before the consolidation). Hargis recently added a suite of integrated, automated services, branded “We” on the company website: We Scan and Alert; We Defend; We Resolve; We Reimburse. Another level of service provides back end support: recovery services if a customer’s identity be stolen or if his computer is infected. The member journey team provides powerful testimony to the rest of the company

demonstrating what it’s like to be the user. Finally, a team of 20 is focused on data analytics.

Hargis said that he still uses the balanced scorecard, which gives him the ability to focus in on four key areas: financials, the customer, interim processes and employees. The metrics demonstrate the business impact of his operation, helping him retain the customer service seat at the leadership table.

The company also deploys proactive recovery measurements, such as activity detection, which allows the company to send outbound alerts warning the customer of possible risk.

Questions for the Panel

Delivering value to the customer

Q. (For Cirocco) How do you measure how well you are delivering value to your customers?

Cirocco: It’s very specific to the business we’re in. We are a business to business sales and marketing agency: we generate demand and accelerate sales for our customers. We provide our clients with outsourced sales development and inside sales resources. It’s about understanding what’s happening with our deliverables, rather than just throwing something over the wall and assuming it fits or that they’re happy with it. It’s about maintaining closed loop reporting and feedback about what they’re doing with the deliverables we provide, and what results they are getting from them. It’s about the partnership and the relationship.

Q. (For Cirocco) Following up, you increased your Net Promoter Score by 20 points in the last seven or eight years. How has that manifested itself in growth and other meaningful financial measures?

Cirocco: In the past seven or eight years, year over year, for top customers our target has been 20 percent, and in that specific set of customers it has been averaging 32 percent. Maybe it’s counterintuitive, but we’ve been able to increase our profitability a couple percentage points as well. And we attribute that to better relationships and better service.

Bringing in chief data officers

Q: (For Prus) One panelist mentioned that if the data structure isn't right and you just throw a system on it you have a mess. How do you structure the role of your new chief data officer in the organization? How is that person going to be empowered to help?

Prus: It's going to be a challenge because we already have data analytics embedded in our systems department and in our marketing department, and now we have a chief data analytics officer who reports to the chief financial officer of the company.

Mohandas: We brought on our chief data officer three months ago. We've built our system to be very entrepreneurial-spirit driven. If we need a service, we buy it and use it. But as we grow from 40 million to 60 million to 100 million to 200 million, we'll need to take a comprehensive look. At this point our chief data officer just mapping systems and data sources. We think of it as "system of reference," "system of use." Where does the data sit? Where does the data get used? He's making mapping charts right now, just to get the lay of the land, and he's found a lot of redundancies already. For example, if you were to call Spear Education and ask, who is my MSA, there are eight different places where we hold that data, and depending on when the last data updates were made there could be discrepancies.

Adjusting service levels for customer groups

"Don't over invest without first understanding ROI."

Q: (from Cirocco) We provide the same level of customer support across all customer engagements. We are looking for ways to make support scalable and predictable in the smaller end of the business. My question is, how have people gone from providing excellent service at the enterprise level to replicating that for the small and medium size businesses while keeping profitability.

Mohandas: We have products that naturally align with the white glove service that kind of customer expects. So, if you have a \$36,000 a year product, you have a dedicated line, you talk to a person you know, and that's the service you expect. But every good market has to have a pyramid, and customer success has one as well. At the bottom of it is what we call the tech [level], and you want that one to be self-service. You don't want the customer to need to call you unless there's something broken. Above that is the light touch, one or two engagements per year, perhaps at the end of the year or at renewal. Above that might be the small and medium size business space, and then the enterprise level, where you are there every month or every quarter – heavy engagements.

So, if you have one way of delivering the service, ask yourself if there are natural elements that become self-service, and does that become a \$29.99 product versus \$350?

Hargis: In order to find where that break point is, there's a way to break down your customer base, from your highest paying customer to your lowest paying customer, into two decile reports. The first decile report will allow you to segment your business into one-tenths of customer value: say, 10 buckets of \$10 million. That will show the break point where 80 percent of your customers fall – the part of your business you want to protect. Then take your customers sorted again by value per customer, and segment them into buckets. Compare the two decile reports and you'll be able to say, I can afford to lose all of these customers. This will help you determine how to restructure the level of service you offer.

Which metrics for Customer Success?

Q. (from Prus) What metric do you value most for measuring Customer Success, and how do you rank it against other business metrics?

Cirocco: Our primary metric has always been the Net Promoter Score, and we also watch profitability. I'm a firm believer that if your customers are incredibly happy – too happy – then your service folks are probably over-delivering, or there's something going on. Customer satisfaction shouldn't be 100 percent – there has to be some balance. But if we're too profitable, if we're making too much money on a particular deal, then we're probably under-delivering or we overpriced them.

Mohandas: In SaaS there is a technique where the cost of acquisition of the customer is the denominator and lifetime value is the numerator. It's a way of show how much the customer costs and what you are getting out of it.

Hargis: I try to measure NPS to make sure we're delivering good service, but then I talk about revenue. The numbers I talk about most that get me the most attention and the most visibility with the CEO are revenue and retention. Richard (Owen) talked about fall off points. With us, if a customer doesn't do anything within 60 days we know he's going to cancel. I also avoid all call center terms. I avoid talking about call centers because I want a seat at the table. NPS and revenue tends to get repeated, and not only by the CEO. Don't let customer service be a lower tier group than sales and marketing.

The Net Promoter Score (NPS) sweet spot

Q. (from the audience) What do you consider a good NPS score? Is there an ideal range, or is it industry-specific?

Mohandas: I really think it's industry-specific. You need to know your company and see what services you are delivering. For me, anything over the mid-20s or 30 is a good range. I'm very happy with a 19, and then it's

about keeping it there and seeing if we can maintain it by scaling better. I doubled the number of accounts that someone supports and still maintain the number. But you must be the judge of how high is too high.

Hargis: You have to figure out that range -- you might be able to do less for a \$29.00 customer. But for us, because our average customer stays 8.8 years, losing a customer that pays \$350 a year could cost you \$2400 lifetime value.

Measuring performance

Q. (from the audience) State Farm contact centers take calls on behalf of agents. When you measure client experience, do you break out those calls?

Prus: We are measuring our own internal customer satisfaction, but we don't separate those calls. How many of you are measuring employee NPS? We just implemented a platform to measure how well our employees think we are doing in communicating our key priorities, through meetings and all that sort of thing. Because, if we manage our employees really well, by extension they will manage our customers really well.

Training

Q. (from Mohandas) What about training? In our rapidly growing company, for me it's all about scale. In achieving scale in training, what are some of the things that are non-negotiable?

Prus: For someone who talks to the customer, we take training very seriously. Training is seven weeks, and it's like drinking from a fire hose. In the last year we've added what we call the sandbox and let them practice, taking role-playing calls through scenarios.

Cicorro: Because we don't do exactly the same thing for every client, training is more experiential. For our Client Success folks we do roughly three weeks of process training. Then it goes into shadowing and being shadowed. It's a lot of learning from each other, a lot of knowledge transfer. I always tell them you'll learn the most from the worst customer you have, because there's so much that I can't teach you until you find yourself knee deep in a deal that's gone wrong. And it's through the process of solving the problems associated with customer challenges that they will learn the most.

Hargis: Our agents go through three weeks of formal training and then we have regular launch-readiness training. I only had 20 people when I started at General Electric and 50 when I left – I didn't know how lucky I was! But your job continues to change and suddenly you are in a bigger company and you need a lot more lead time. For example, product changes: it was great when we decided to move some operations to the Philippines, except all of our marketing messaging said we offered U.S.-based service. To train 3,000 people takes a large coordinated effort – much more so the larger you get.

Q. (from Mohandas) At what point do you go with a dedicated trainer, versus having training being part of someone's job?

Hargis: It depends on how fast you're growing. Once you're at 10 people or more I think it makes sense to have a dedicated trainer. It depends on how complicated your product is. With our product, if we explain it the wrong way we can get sued. *"Culture can eat customer success for breakfast: it can cure deficiencies or destroy a great idea."*

Appendix

Center for Services Leadership Community of Practice on Customer Success

The meeting summarized in this whitepaper highlighted the strong interest in Customer Success within the Center for Services Leadership community. Among the Center's member firms, Customer Success is a vibrant topic that encompasses many aspects of dealing with customers: customer satisfaction, customer loyalty, Net Promoter Scores, customer success, customer relationship management, customer analytics, call center management, employee incentive structures, customer-focused operational excellence and many more issues.

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If you are interested in joining the Community of Practice on Customer Success, please send an email to thomas.hollmann@asu.edu.

Biographies

Keynote Speakers

Richard Owen - Richard Owen is the founder and CEO of the OWEN CX Group, an organization with the singular purpose of helping corporations achieve success with their customer experience programs. OWEN CX Group is re-imagining how the art and science of NPS can be brought together to transform business. Richard has enjoyed a 30-year career centered around the use of technology to transform business operations. As an executive at Dell Computer Corporation, he oversaw the re-engineering of the companies

supply chain operations and, as VP of Online, the scaling of the world's largest electronic commerce business of the 1990s. He has led two software companies to successful exits, with AvantGo (mobile enterprise software) achieving a public listing on the Nasdaq and Satmetrix, the cloud software co-creator of NPS, sold to NICE Systems. Richard has held several board positions in both public and private companies and has served on compensation, audit and special board committees. Richard holds an undergraduate degree in Mathematics and Economics from the University of Nottingham, England, and an MBA From the MIT Sloan School of Management. He lives with his wife Susan and son Alex in the Bay Area, California.

Shreesha Ramdas - Shreesha Ramdas is the CEO and co-founder of Strikedeck. Previously, he was the general manager of the marketing cloud at CallidusCloud, co-founder at LeadFormix (acquired by CallidusCloud) and OuterJoin, and general manager at Yodlee. Prior to that, Shreesha led teams in sales and marketing at Catalytic Software, MW2 Consulting and Tata. Shreesha advises several startups on marketing and growth hacking.

Professional Panel

Michelle Cirocco – Head of Global Marketing, Televerde

Michelle joined Televerde in 1999, where her experience includes leadership positions with the sales, client success, and now marketing departments. In 19 years at Televerde Michelle's commitment to the customer experience and passion for sales and marketing has contributed to the long-term growth and success of the company. She is a strong customer champion with a tireless commitment to demand generation excellence and best practices. Michelle's primary focus has been, and continues to be, to create long-term customer loyalty for Televerde. She is a talented and accomplished executive who is skilled in analyzing business needs and creating innovative programs, processes and strategies that consistently lead to client loyalty and business growth through changes and challenges to generate demand and accelerate revenue. Michelle is also the executive sponsor for Televerde's corporate social responsibility initiatives and is personally involved with several local charities, including the Phoenix Rescue Mission and the Arouet Foundation. She is an advocate for women's leadership and serves as a role model for Gina's Team and Athena International. Michelle has an MBA from Arizona State University's W. P. Carey School of Business and a bachelor's degree in marketing from the University of Phoenix. A fan of TED, she has attended the past two TEDWomen conferences, and was the lead organizer for TEDxPerryvilleCorrections. She's has completed 10 marathons and loves to play golf in the summer and snow ski in the winter. She lives in Peoria with her husband Chris and has two grown sons, one in the US Navy and the other following in her footsteps as a sales executive at Televerde.

Michael Hargis – Senior Vice President, Global Consumer Services and Sales Symantec

Michael Hargis leads member experience for the company, bringing LifeLock's service commitment to life. In this role, he oversees member services, business operations, data analytics, resolutions, process

improvement initiatives and business partner operations. Hargis joined LifeLock in October 2013. Previously, he was vice president of global service and operations at CareerBuilder, where he built a team from the ground up across North America, Europe, the Middle East, Africa and Asia-Pacific. The CareerBuilder team was recognized with multiple “Best Customer Care Team” awards. Hargis also served at GE Capital where he held leadership positions at both GE Retailer Financial Services and GE Consumer Cards. Hargis has an MBA from Northwestern University’s Kellogg School of Management and a bachelor’s degree from Thomas More College. Hargis is an active Wharton Fellow at the University of Pennsylvania.

Suraj Mohandas – Vice President of Customer Success

Spear Education

Suraj Mohandas is passionate about making his team and customers super successful. He is an experienced and talented senior executive with innate ability to lead teams in a dynamic, fast-paced and competitive market space. Suraj possesses strong technical, business, and research proficiency with more than 15 years of experience in developing strategies around customer success, customer experience, customer operations, pricing, process improvement, supply chain management, team building and change management. He enjoys analyzing complex business data, scrutinizing corporate financials, and achieving overall company goals.

Dave Prus – Assistant Vice President, Customer Care Center, State Farm Mutual Automobile Insurance Companies

Dave Prus oversees the call center service functions designed to support State Farm Agents and customers. Dave joined State Farm in 2000 and has served in a variety of executive leadership positions including director in the financial services integration office, and marketing and sales director. He assumed his current position in March 2014. Dave received an MBA from John Carroll University and a bachelor’s degree in business economics from The College of Wooster. He also earned the Chartered Financial Consultant (ChFC) designation.

Center for Services Leadership

Thomas Hollmann Ph.D., Clinical Associate Professor of Marketing, Faculty Director for Member Engagement, Center for Services Leadership, W. P. Carey School of Business

Thomas’ work experience spans four countries and more than 10 years in Fortune 100 companies, including Black & Decker, Xerox, and as an executive, Sun Life Financial. Thomas’s research interests include services science, with a focus on B2B, service analytics, and relationship marketing, with a particular interest in relationship outcomes (profitability, customer equity, defection, retention, satisfaction, etc.). His research has appeared in the Journal of the Academy of Marketing Science, the Journal of Business and Industrial Marketing and at several leading marketing and services conferences. He has received research grants and awards from the Center for Innovation Management Studies, Xerox, IBM, and the Center for Services

Leadership. Thomas has consulted with a range of Fortune 500 firms and has received awards for his teaching at Arizona State University and at North Carolina State University. He earned a Ph.D. in marketing from Arizona State University.

Wolfgang Ulaga, Ph.D. – Professor of Marketing at INSEAD, Europe Campus

Wolfgang works with business-to-business firms, executives and students around the globe on improving their competencies and skills in Marketing and Sales of B2B Products and Services. His executive education and teaching activities focus on how to create value for (and with) B2B customers, capture value through better pricing, compete through service excellence and create outstanding customer experiences in professional services and industrial goods markets. Over the past 20 years, he has consulted with companies in diverse industries and designed and delivered customized executive programs for corporations in services markets such as energy, global logistics, recycling and waste treatment, retailing, or telecommunications and in industrial goods markets such as aerospace, capital equipment, cables, chemicals, industrial gases, or medical devices. Wolfgang's research has been published in leading academic and managerial publications including Harvard Business Review, Journal of Marketing, Journal of the Academy of Marketing Science (JAMS); Journal of Service Research, Journal of Business Research, Industrial Marketing Management, among others. Wolfgang has cases at on service-based strategies for B2B firms, such as GE Healthcare India, Michelin Fleet Solutions and Châteauform. He has also co-authored a book on Service Business Models. Wolfgang has won numerous awards, e.g. the 2010 HEC Paris Best Teacher of the Year Award, the 2011 American Marketing Association's (AMA) Winter Educator's Conference Overall Best Paper Award, and the 2015 Annual Award for The Case Center's globally best-selling case in Marketing. Prior to joining INSEAD, he served as the Co-Executive Director at the Center for Services Leadership in the W. P. Carey School of Business. He was also previously on the full-time faculties at IMD Lausanne, HEC School of Management Paris, ESCP-EAP Paris, EDHEC Lille, and the University of Notre Dame, Indiana (Visiting Professor).
