Association Customer Success Resource Registry V5

1. About The Customer Success Technology (CSTECH) Vendor List Application

As the worldwide Customer Success profession and community continues to grow at an ever increasing pace, many companies are beginning to turn to outside resources for help in developing and extending their Customer Success capabilities. To assist those companies in locating appropriate resources, the Customer Success Association has created The Customer Success Resource Registry for consulting, training, recruiting, and other service providers.

The Customer Success Resource Registry has two aspects. The first is a simple listing of company names as links to their respective websites. Only those providers who maintain appropriate web pages about their Customer Success-specific services may be included in the CS Resource Registry list. The second aspect is a detailed breakdown of specific service categories and types together with links for providers offering appropriate services within that category and type.

To be considered for inclusion at any level of The Customer Success Resource Registry, companies must fully complete the application form and qualify for listing.
Note: The Customer Success Association maintains a strict policy of vendor- neutrality. Whatever is made available to one vendor must be available to any other; we never do anything that is commission-based or that would give rise to any perception of favoring any vendor over the others.

Followup comments / questions may be sent to Mikael Blaisdell by email: mikael@mblaisdell.com

1. Contact Information

Name:

Company:

Title:

Address: City/Town:

State/Province:

ZIP/Postal Code:

Country:

Main company website

Permanent Email Address:

Phone Number:

2. Please provide a 50-word (max) description of your company

3. What is the size of your company?

○ Individual / Sole proprietor

○ 2-5 employees

○ 6-10 employees

○ 11-25 employees

○ 26 or more employees

Comments and Explanations

4. Do you have associates that work with you on projects on a contract basis?

○ No, all of our staff members are employees

○ Yes, we have contracting relationships with non-employee associates

○ Other. (Please describe)

Comments and Explanations

```


```

5. For how long have you been offering consulting, training, recruiting, or other services in the Customer Success sector?1

○ less than 1 year

○ 1-2 years

○ 3-4 years

○ 5 years or more

Comments and Explanations

```


```

6. Does your company have offices in more than one country?

○ No, our primary office is listed in question 1 above.

○ Yes, our company has offices in more than one country. (Please list in the comments field below)

○ We have plans to open office in other countries in the future.

○ Other. Please describe.

Comments and Explanations

```


```

7. If you have contract, referral or other relationships with Customer Success Technology vendors, please identify the kinds of services you provide. Please also identify the vendors with whom you have such relationships in the Comments and Explanations field below:

○ We have no contract or referral relationships with any Customer Success technology vendors.

○ We provide consultation and/or other services to their customers on a sub-contract basis.

○ We get referrals to prospects for our services from them.

○ Paid speaking engagements

○ We run meetups, user-groups or other meetings for them.

○ We are an Authorized Reseller

○ Commissioned Influencer (You are paid for referrals, etc.)

○ We do implementation, on-boarding or other technical services for them.

○ Systems Administrator

○ Trainer

○ Paid content provider / subject matter expert

○ We are a member of their Advisory board(s)

○ Other. (Please describe)

Comments and Explanations

```


```

8. What is your market focus?

○ Enterprise clients with 1,000+ employees

○ Large companies with 500-999 employees

○ Medium sized companies with 200-499 employees

○ Small businesses / startups with less than 199 employees

9. Are you coordinating/leading any local Customer Success focused meetups or other professional gatherings? If so, please provide the URL to the group's registration page and/or other websites (LinkedIn discussion groups, other online community resources, etc.)

○ Yes

○ No

○ Other. (Please describe)

Comments and Explanations

Customer Success Resource Registry V5

2. Customer Success Consultants

The following questions must be fully answered in order for a firm to be listed on The Customer Sucess Consultants Registry page and The Customer Success Consulting Services Directory page of the Customer Success Association site.

For Question #10, in order for your company to be listed on the Services Directory page under the specific category, your website must have content describing the offered services for that category.

10. Please indicate the specific Customer Success consulting services that your firm offers. If you offer Interim or Outsourced CS Executives,Operations or SysAdmin services, please be sure to complete the Outsourcing section of this application as well.)

○ CS Remote Consultation

○ CS Team Evaluation - Assessment - Reviews

○ CS Organizational Design

○ The Business of Customer Success - ROI Analyses

○ Premium CS product/service Design

○ CS Metrics Suite Design - Implementation

○ CS Compensation Plan Design - Implementation

○ CS Process / Workflows / Playbook Design

○ Customer Journey Mapping

○ Customer Base Segmentation

○ Customer Health & Risk Assessment; Churn Analysis & Remediation; Data Analytics

○ Customer Value Reviews / QBR Design & Development

○ Individual CS Plan Design & Development

○ Self-Success / "Tech Touch" / Knowledge Mgmt

○ OnBoarding Design

○ Voice of the Customer / Customer Advocacy Program Development / Surveying

○ Interim/Fractional and/or Outsourced CS Executive Leadership (Please also complete the Outsourcing page, if so.)

○ Interim/Fractional and/or Outsourced CS Operations Services - (Please also complete the Outsourcing page, if so.)

○ Interim/Fractional and/or Outsourced CS Software Systems Administration - (Please also complete the Outsourcing page, if so.)

○ CSTECH Vendor/Product Selection Consulting

○ Independent CSTECH Implementation

11. Do you offer any other CS Consulting services that are not listed above? If so, please explain.
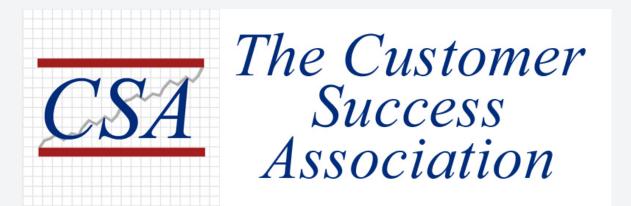
3. Customer Success Training Vendors

The following questions must be fully answered in order for a training firm to be listed on The Customer Success Training Registry page and The Customer Success Training Catalog page of the Customer Success Association site.

For Question #14, in order for your company to be listed on the Training Catalog page under the specific category, your website must have content describing the offered course (s) for that category.

If you do not offer training services, please skip the questions on this page.

12. Please identify your client types / audiences. Please check all that apply:
- ○ CSM practitioners, customer-facing individuals.
- ○ CS executives / team leadership.
- ○ Customer Success Operations analysts.
- ○ Customer Success Account Management/Sales Customer
- ○ Success teams.
- ○ Other. (Please describe)

Comments and Explanations

13. If you offer standardized (i.e. "canned") courses, how are they delivered? Please check all that apply.

- ○ Instructor-led classroom sessions
- ○ Instructor-led online seminars
- ○ Individual Coaching sessions
- ○ Individual On-Demand courses
- ○ Instructor-led small group online Forums
- ○ White-label content for companies to use internally, including "train the trainer"
- ○ Other. (Please describe)

Comments and Explanations

14. If you offer customized courses, how are they delivered? Please check all that apply

- ○ Instructor-led classroom sessions
- ○ Instructor-led online seminars
- ○ Individual Coaching sessions
- ○ Individual On-Demand courses
- ○ Instructor-led small group online Forums
- ○ Customized white-label content for companies to use internally, including "train the trainer"
- ○ Other. (Please describe)

Comments and Explanations

15. **Please indicate the specific Customer Success training courses/services that your firm offers. (Note that if there is no specific content on your company website that offers the description, then you cannot be listed in that category) CSM (practitioner, customer-facing) Training / Coaching / Mentoring**

○ Customer Success Team Training

○ Customer Success Executive (team-leadership) Training / Coaching / Mentoring

○ Customer Success Operations Training / Coaching / Mentoring

○ Customer Success Account Management/Sales Training / Coaching / Mentoring

○ Customer Success Change Management Training / Coaching / Mentoring

○ User Adoption Training / Coaching / Mentoring

○ Onboarding Program Training / Coaching / Mentoring

16. **Do you offer any other CS Training services that are not listed above? If so, please explain.**

Customer Success Resource Registry V5

4. Customer Success Recruiters

The following questions must be fully answered in order for a search firm to be listed on The Customer Success Search Firms page and The Customer Success Recruiting Map page of the Customer Success Association site.

If you do not offer recruiting services, please skip the questions on this page.

17. If you offer recruiting services in the Customer Success community please identify which types of fee arrangements you offer. Please check all that apply.

○ We are retained by individuals to help them find CS jobs.

○ We are retained by companies to help fill CS positions.

Comments and Explanations

```



```

18. What categories / position types of Customer Success professionals do you work to fill? Please check all that apply.

○ Customer Success Managers (CSMs) These are customer-facing / practitioner positions.

○ Customer Success Executive Team?Group Leadership positions.
(CCO / VPCS / DCS / HCS / MCS)

○ Customer Success Operations

○ Customer Success Account Management

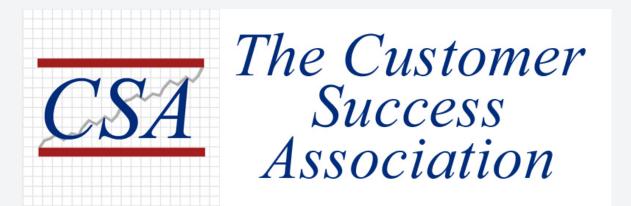Other roles / Comments and Explanations

```



```

5. Customer Success Outsourcers / Interim Staffing

The following questions must be fully answered in order for an outsourcing firm to be listed on The Customer Success Outsourcing Registry page and The Customer Success Outsourcing Catalog page of the Customer Success Association site.

If you offer Interim or Fractional Staffing services at any level, please complete the questions on this page.

If you do not offer Interim or Fractional Staffing / Outsourcing services, please skip the questions on this page.

19. What Customer Success roles does your firm fill on an Outsourced or Interim basis? Please check all that apply.

- ○ Customer Success Managers (CSMs) These are customer-facing / practitioner roles.
- ○ Customer Success Executive Team/Group Leadership
- ○ Customer Success Account Management: Renewals
- ○ Customer Success Account Management: Up-Sells
- ○ Customer Success Account Management: Cross-Sells
- ○ Onboarding
- ○ Change Management
- ○ Adoption
- ○ Health Scoring
- ○ Business Advisory/Coaching
- ○ Self-Success / "Tech-Touch"
- ○ Training
- ○ Customer Support
- ○ Customer Intelligence / Market Research Customer Advocacy
- ○ Management Customer Success Operations / Analysis Customer
- ○ Success Technology System Administration
- ○ Other. Please describe.

Comments and Explanations

6. Next Steps

Thank you for completing The Customer Success Resource Registry application. Your application will be reviewed together with your company's website content as soon as possible. Qualifying companies will then be added to the Registry pages as appropriate.

If you have further questions, please contact: mikael@mblaisdell.com