



Dedicated or Pooled Customer Success Models: Which is for me?

Whether you're at a small, medium, or large company, the same thing holds true: *customers are the heart of your business.*





Spoiler alert.

There is no right answer. So rather than ask, 'which is for me?', the answer is dependent on your own business goals and is bound to change as your customer base evolves.



PRIORITIZING THE SUCCESS OF THE CUSTOMER

Customer success teams may be structured differently, but all share a common overarching objective: helping their customers achieve their goals.

Loyalty is the name of the game; repeat customers are crucial to success. It's much easier to achieve growth by retaining or expanding existing customers than converting new ones.

Early on, customer success can take many forms, such as account management and onboarding. But as the function becomes more formal and the team grows, it's important to assess and determine which engagement model — or combination of models — is best for your business and customers.



Customer success engagement models: Dedicated vs. Pooled

When thinking about engagement models, the usual things that come to mind are product improvements, improved customer retention, and the customer journey. Engagement models can also be viewed as a larger part of your team's success strategy.

Looking at it from this perspective will help you understand how your customers engage with your product and what needs improvement to provide a fully personalized experience. While a dedicated model enables you to build strong and strategic relationships with your customers, a pooled model allows for scale. It's about finding the balance of making your customers feel supported while ensuring team productivity and efficiency.

At the end of the day, the question is, **"Does your customer engagement model build long-lasting relationships with your customers?"**



Dedicated models for high touch, 1:1 customer relationships

This model is a good fit for your most strategic customers with dedicated account resources. The outreach from the customer success and account management team is usually proactive, and communications are 100% tailored to those high-value customers.

Structuring a dedicated engagement model is straightforward. It's one assigned point of contact who manages the customer relationship. A dedicated contact is especially critical for accounts that have more complex or require additional support. This is great for building relationships with those key accounts, but scalability and resource allocation quickly become issues.

Product deployment and onboarding may be more complex or customized in larger accounts. This requires customer success and account management teams to work closely together along with the customer, often focused on the strategy, optimizations, and best practices for these accounts.

With a dedicated, high touch model, teams can provide:

- **A highly personalized relationship**
- **Assigned resources who spend significant time supporting the customer**
- **A consultative partnership focused on strategic success**

CUSTOMER ENGAGEMENT MODELS



Dedicated / High-touch

- Large revenue or key accounts
- Assigned resources who spend significant time with the customer
- Proactive, highly personalized outreach
- High business complexity or customization
- Partnership is strategic



Pooled CSMs for low-touch, 1:many customer relationships

Teams that manage a high volume of requests across a bigger customer base of lower value are a better fit for pooled success models. When done right, pooled models allow greater scale, improved revenue coverage, and better workload distribution for your team. In some cases, teammates in a pooled model can even develop specialized product expertise rather than learn everything for smaller customers.

Typically in a pooled model, teams manage larger books of business and broader customer segments. This allows businesses to provide quality support without committing dedicated customer success and account managers per customer.

Pooled models let companies provide support to a broader set of customers. In a pooled model, teams can:

- **Work together to share best practices and transfer knowledge**
- **Offer widespread customer coverage with more even workload distribution**
- **Deliver more consistent experiences to a higher number of customers**

CUSTOMER ENGAGEMENT MODELS



Pooled / Low-touch

- Wider customer base with lower value accounts
- Pooled resources with round robin distribution
- High volume of requests
- Helps achieve scale and better revenue coverage
- Very collaborative between teammates



Remember the spoiler alert?

There is no right answer. Your interactions with your customers will continue to evolve. Your team could use a combination of both dedicated and pooled models to service different types of customers.

Customer success teams should know how to provide both to give the most value to their customers. It is likely that your highest value customers will change over time, your customer base will expand, or your strategy will be tweaked a bit. What should always remain in the success of your customers, and how you can help achieve their goals.



Best practices for customer success teams

Here are some tips for choosing the right customer success team structure:

Determine how customers will be segmented. It can be based on account revenue, geography, customer maturity, number of employees, or deployment complexity. This is up to you regarding how you want to segment your customers.

Establish the roles and points of handoffs. Between close teams (account management, onboarding, support, etc.). In doing so, success teams can focus on driving customer value rather than fixing technical bugs or doing training sessions. It's also equally important to establish expectations with customers

Map out workflows and the order of operations, so teams know exactly how customer inquiries are handled. Use technology to your advantage and to enhance the way you engage with customers.

Ensure a way to share customer data and context across the team seamlessly. As the number of customers and teammates grows, complexity increases as well. Customer success is a highly collaborative team effort, so it's critical to ensure that everyone stays aligned and on the same page.



Front for customer success teams

Front is a hub for customer communication that allows companies to offer tailor-made service at scale. Customer success teams use Front to work together to drive retention and expand existing revenue. Whether sharing customer feedback with product teams, coordinating support or billing requests, or ensuring high-priority messages get in the right hands quickly, Front's simple, yet powerful solution makes collaboration seamless.

With Front, customer success teams use technology to take their customer relationships to the next level.

FRONT ENABLES SUCCESS TEAMS TO:

- Scale the human touch to drive better revenue coverage and efficiency per teammate
- Never miss a beat with smooth handoffs, so your team operates with ease
- Operate with ease by using automation and routing rules to round-robin or load-balance customer requests
- Ensure smooth handoffs with improved collaboration and shared context—customer success is a team effort!
- Keep track of everything from customer communications to your favorite apps all in one place to minimize context switching or human error

See how Front helps success teams at *Shopify*, *Instructure*, *Boostability*, and more to give outstanding customer experiences.

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