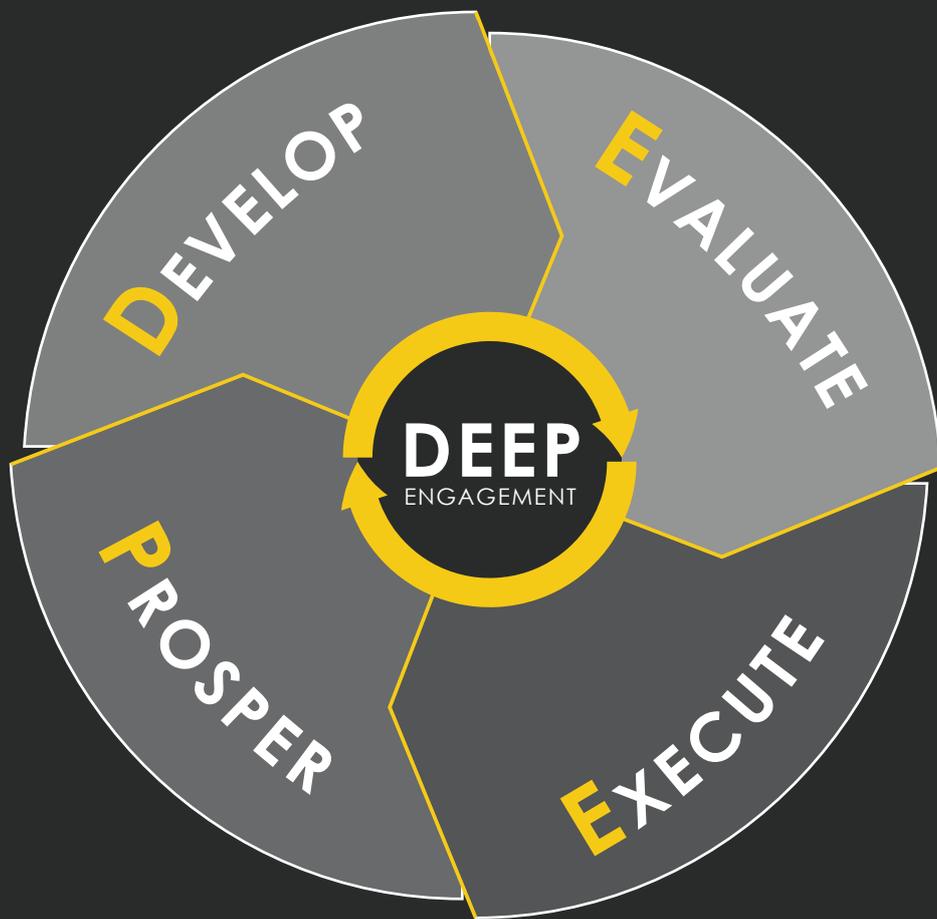


# DEEP Engagement

THE FRAMEWORK FOR GENERATION 3  
CUSTOMER SUCCESS



# SUCCESS OUTCOMES

Enabling customers' success outcomes lies at the heart of Generation 3 Customer Success. If this concept isn't familiar, please read the white paper entitled 'Introduction to Generation 3 Customer Success'. It will give context to this paper.

## DEEP ENGAGEMENT

DEEP Engagement provides a framework around which to build a customer success program. It assumes a lifecycle with each customer. It offers four phases - **Develop**, **Evaluate**, **Execute** and **Prosper**.

Let's look at each phase.

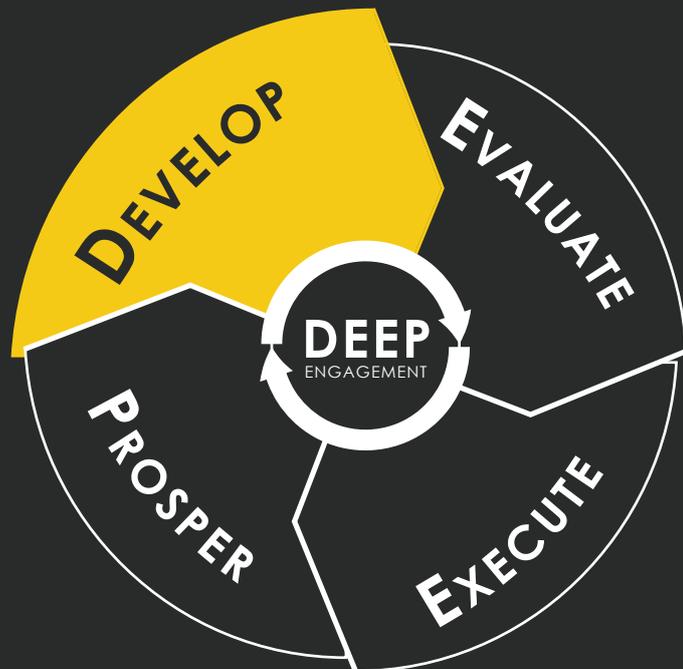
### Develop Phase

In the Develop phase, Generation 3 vendors create interest in improving the success outcome they serve. Marketing leads the work in the Develop phase. And Sales delivers the same messages in their one-on-one engagement with customers. The Develop phase is relevant for both existing customers and new customer lead generation.

Generation 3 marketers have learned not to focus on products. They focus on success outcomes. The logic is simple. Customers and prospects only care about their success outcome. If the marketing and sales messages focus on the

success outcome, the customers and prospects will pay attention. If the marketing and sales messages focus on products and services, the customers and prospects will ignore them.

So, Generation 3 vendors emphasise the importance of the success outcome. For some vendors the success outcome is self-evident. Its importance needs no promotion. For example, a marketing automation



vendor serves a success outcome of ‘pipeline generated’. They don’t need to convince their customers of the importance of an adequate pipeline.

For other vendors, the success outcome may deliver insight. For example, a content management vendor will help organisations make good decisions. They may

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***In the Develop phase, Generation 3 vendors create interest in improving the success outcome they serve.***

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also offer workflow to define decision-making processes. And they may provide governance, controlling access to sensitive information. Their success outcome might be ‘informed and governed decisions’.

Some customers may not have considered their need in these terms. But once they

hear the phrase ‘informed and governed decisions’, it resonates. The customers realise they want informed and governed decisions. They realise they need all three elements offered by this vendor. And that increases the chance for this vendor to win the business.

Generation 3 vendors use the success outcome as a unifying theme – a way to build consensus. For example, government departments would align around achieving a to-be state (success outcome) of making informed and governed decisions.

## **Content Marketing**

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Generation 3 vendors provide insight based on the success outcome they serve. Articles, podcasts, webinars, blogs etc can cover the benefits of achieving the success outcome. Or the costs and risks of not achieving the success outcome. They can offer new methods for achieving or improving the success outcome. They can

benchmark the success outcome. In all cases the content marketing reinforces the need to improve the success outcome.

## **Sales**

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The sales teams can promote the same ideas through their direct engagement with customers. And salespeople increase their access to senior executives by focusing on success outcomes. Executives don’t want to discuss products. They want to discuss outcomes.

## **Summary**

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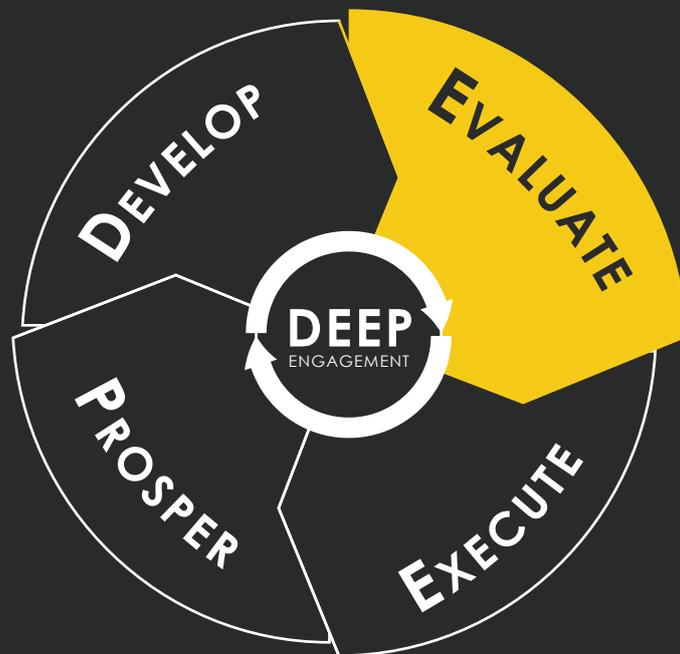
In the Develop phase, the vendor has two objectives. First, ensure the customer sees the importance of the vendor’s success outcome. Second, ensure the customer sees the vendor as best able to help achieve or improve that success outcome.

## Evaluate Phase

Generation 3 vendors of simpler products ensure the evaluation phase is as automated as possible. They use their own products and partner products to provide everything the customer needs to achieve the success outcome.

Generation 3 vendors of complex offerings identify projects to improve the success outcome. They do this with the customer – it's a joint activity. The customer evaluates the projects and decides which ones will proceed. The process is a recurring one – it happens every year or every quarter.

The work done by CEB in the Challenger Sale series<sup>(1)</sup> gives insight into the need for early engagement by the vendor. But CEB estimates the average buying process is 57% complete before the buyer talks to the vendor. The buyer has already decided the problems they'll solve and the requirements that will drive their purchase.

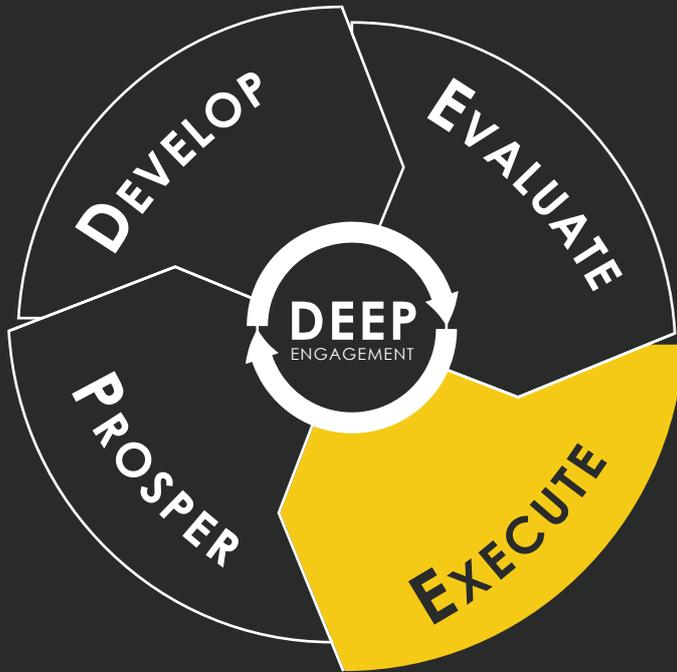


And the lack of consensus within the buying organisation keeps the requirements to a bare minimum. These minimal requirements mean the customer doesn't place value on the extra things a vendor can do. And this in turn drives down what the buyer will pay. Vendors can end up in a race for the bottom on price.

In existing customers, Generation 3 vendors have

learned how to become involved in the buying process at the very start. They use the Evaluate phase to help the customer identify projects that will improve the success outcome. They work jointly with the customer as they evaluate potential projects. And the vendors are paid for at least some of their work in this phase.

## Execute Phase



**The purpose of this phase is to deliver and measure the improvements in the success outcome.**

The next phase of DEEP Engagement focuses on delivering the outcome for approved projects. The purpose of this phase is to deliver and measure the improvements in the success outcome.

For vendors with complex offerings, Services leads the work in this phase. In many projects, Success Consultants play a role in both the Evaluate phase and the Execute phase. Success consultants understand

and advise on everything needed to achieve the success outcome. They're not product experts. Their role is broader.

For vendors of simpler products, the onboarding process involves much more productization. They have much less reliance on consulting and other services.

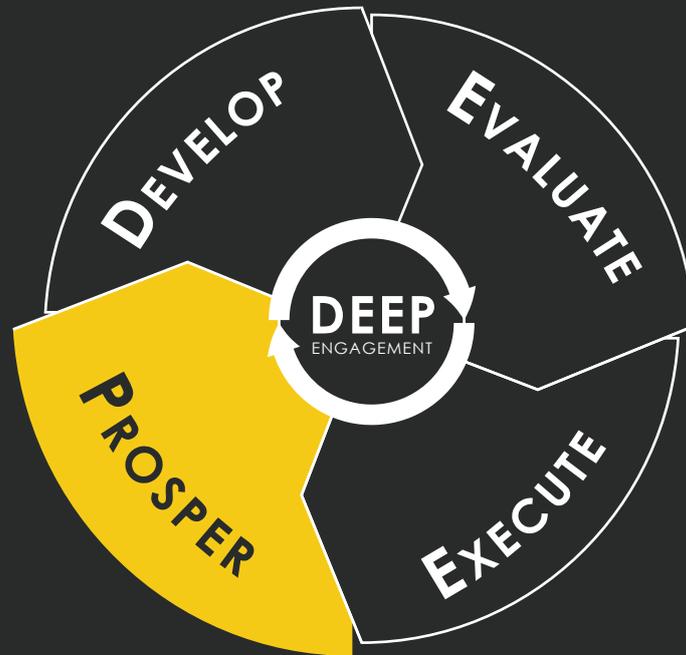
## Prosper Phase

Project success delivers business returns for the customer. The project teams have achieved or improved the success outcome. But customers can't assume the improvement will continue. They must monitor and nurture the results. And the results can be further improved, particularly as business conditions evolve. A continuous improvement approach will help ensure the customer enjoys ongoing and increasing benefits from the success outcome.

The customer and vendor work together to create a monitoring process. Cloud implementations give the vendor an opportunity to monitor in a much more meaningful way. The vendor has access to much more information from the customer's systems. With the customer's permission, the vendor can analyse how the business functions. Early warning and alerts can trigger action earlier.

In Generation 3 vendors, the role of the Support department has evolved. In the past, the Support department reacted to product problems when notified by the customer. Now they're becoming proactive departments, reaching out before customers report problems. Many are developing predictive skills, identifying circumstances that could lead to problems. They also play a far more central role in

monitoring success outcomes and ensuring reporting to the customer and vendor.



## Quick Wins

While Generation 3 vendors implement all DEEP steps, they don't need to finish to enjoy quick wins. The messaging around success outcomes can be used immediately in sales deals. Marketing can base a campaign around the success outcome. Services can start agreeing project objectives with customers. These quick wins help the vendor evolve to Generation 3.

## Summary

The four phases of DEEP Engagement, Develop, Evaluate, Execute, Prosper, cover the entire customer lifecycle. Each vendor will create a set of lifecycle steps that suits their unique business. All steps have a common theme - enabling the customers' success outcomes. And the reward for vendors is loyal revenue growth.

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