

# 2022 Digital Transformation Trends in Customer Success

Digital transformation is the integration of digital technology into all areas of business, fundamentally changing how you operate and deliver value to customers.

Gartner Peer Insights and Vitality surveyed 100 technology executives involved in Customer Success to understand how companies are planning for Customer Success' digital transformation, the obstacles they're facing, and the outcomes they hope to see as a result of prioritizing integrating digital technology into this business-critical department.

Data collection: February 4, 2022 - March 8, 2022

Respondents: 100 respondents in sales, marketing, and customer success

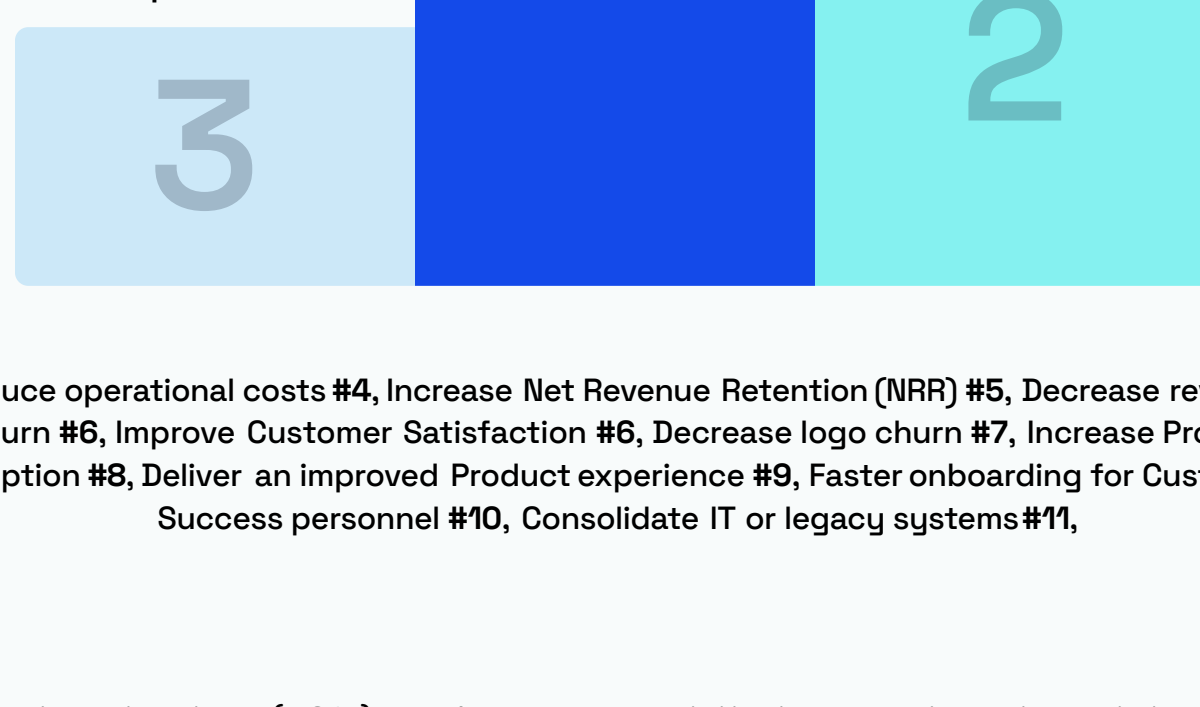
**Technology leaders are committed to the digital transformation of Customer Success in an effort to increase expansion revenue and improve the customer experience, but cross-functional alignment and lack of bandwidth are holding them back.**

Is Digital Transformation a top priority for your Customer Success organization in the next 12 months - why or why not?



The top three outcomes that organizations expect to achieve with digital transformation in Customer Success are increased expansion revenue, increased speed and agility within the Customer Success department, and an improved Customer Experience.

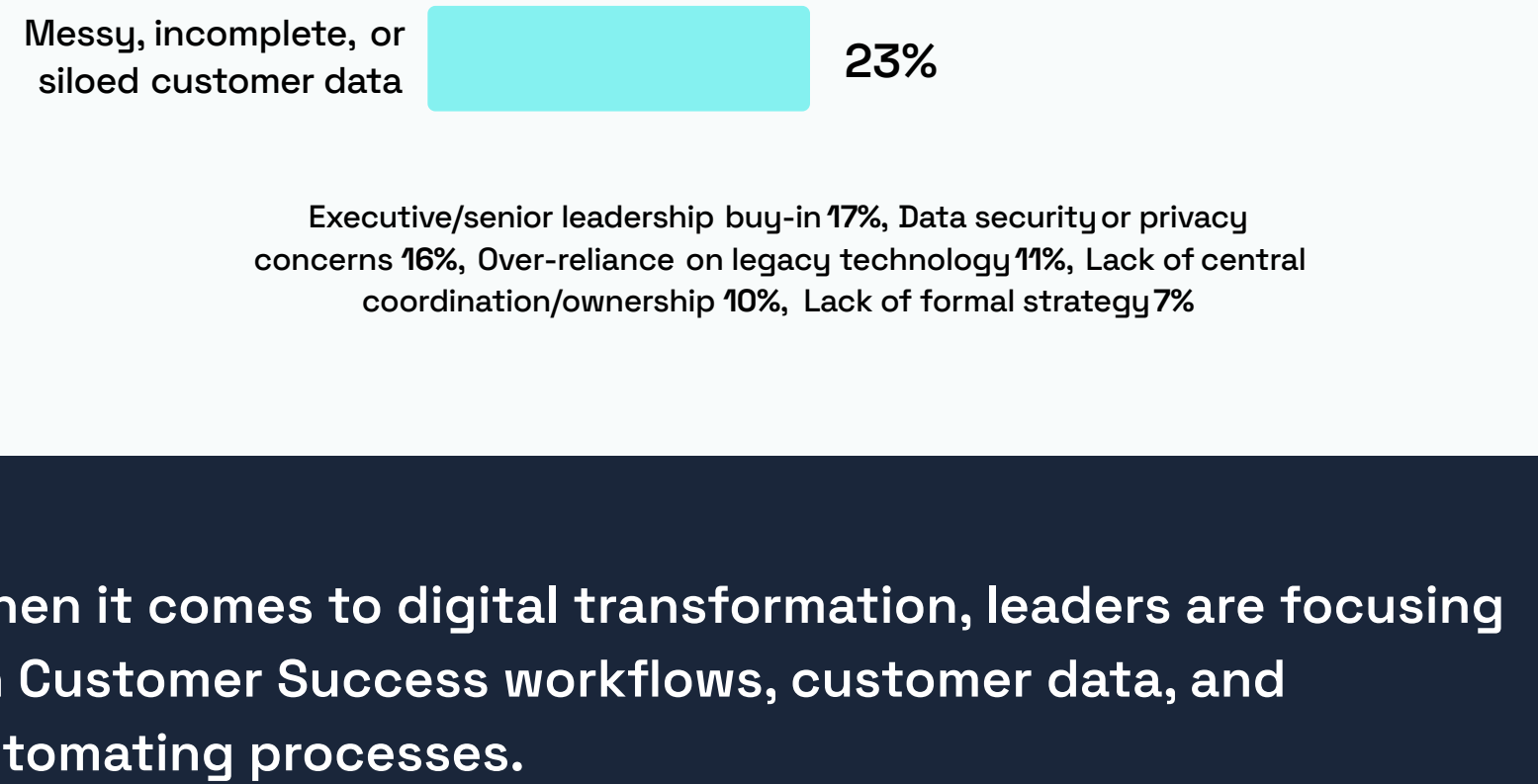
Please rank the top 3 outcomes your organization expects to achieve through digital transformation of Customer Success.



Reduce operational costs #4, Increase Net Revenue Retention (NRR) #5, Decrease revenue churn #6, Improve Customer Satisfaction #6, Decrease logo churn #7, Increase Product adoption #8, Deliver an improved Product experience #9, Faster onboarding for Customer Success personnel #10, Consolidate IT or legacy systems #11.

Most technology leaders (60%) are in agreement that cross-departmental alignment is one of the top barriers to successful digital transformation in Customer Success. The next biggest challenge is the lack of bandwidth to implement new technology, selected by 37% of respondents.

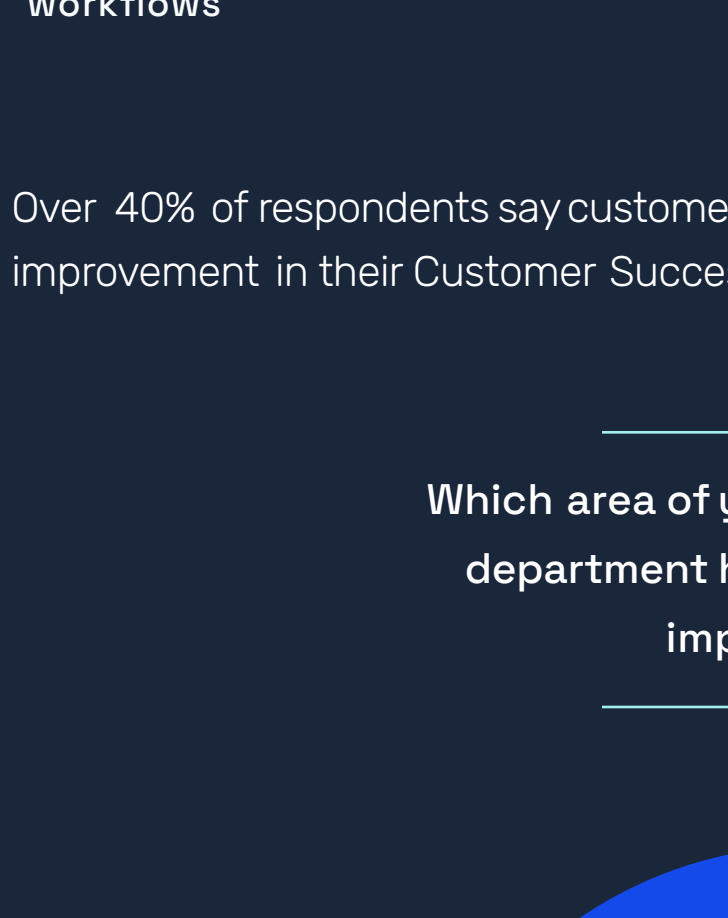
What are the 3 biggest barriers to Customer Success' digital transformation at your organization?



Executive/senior leadership buy-in 17%, Data security or privacy concerns 16%, Over-reliance on legacy technology 11%, Lack of central coordination/ownership 10%, Lack of formal strategy 7%

**When it comes to digital transformation, leaders are focusing on Customer Success workflows, customer data, and automating processes.**

Almost two-thirds (65%) of respondents say designing and building Customer Success processes and workflows is one of their top priorities when it comes to the digital transformation of Customer Success. Just over half (51%) cite unifying and enriching customer data as a top focus area.

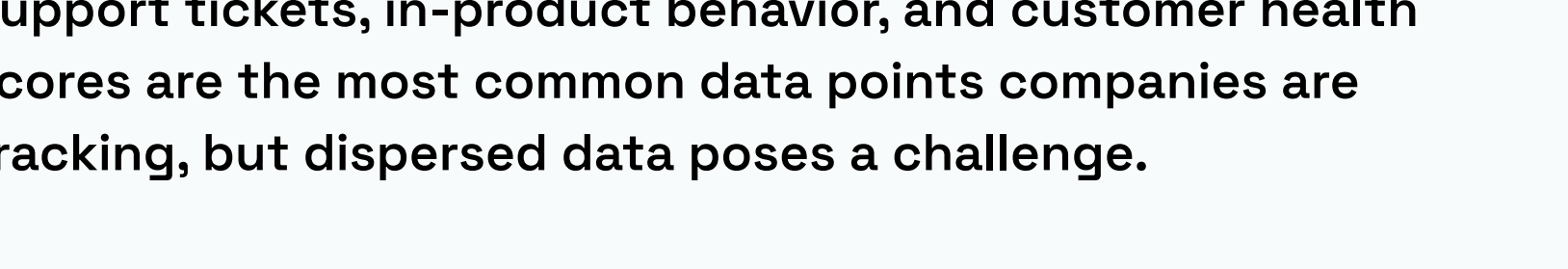


Which of the following most align with your organization's top 3 focus areas for the Customer Success department's digital transformation?

Investing in and implementing tools dedicated to Customer Success 32%, Improving hygiene of customer data 31%, Continuing to build out Customer Success's technology stack 20%

Over 40% of respondents say customer data has the most room for improvement in their Customer Success department.

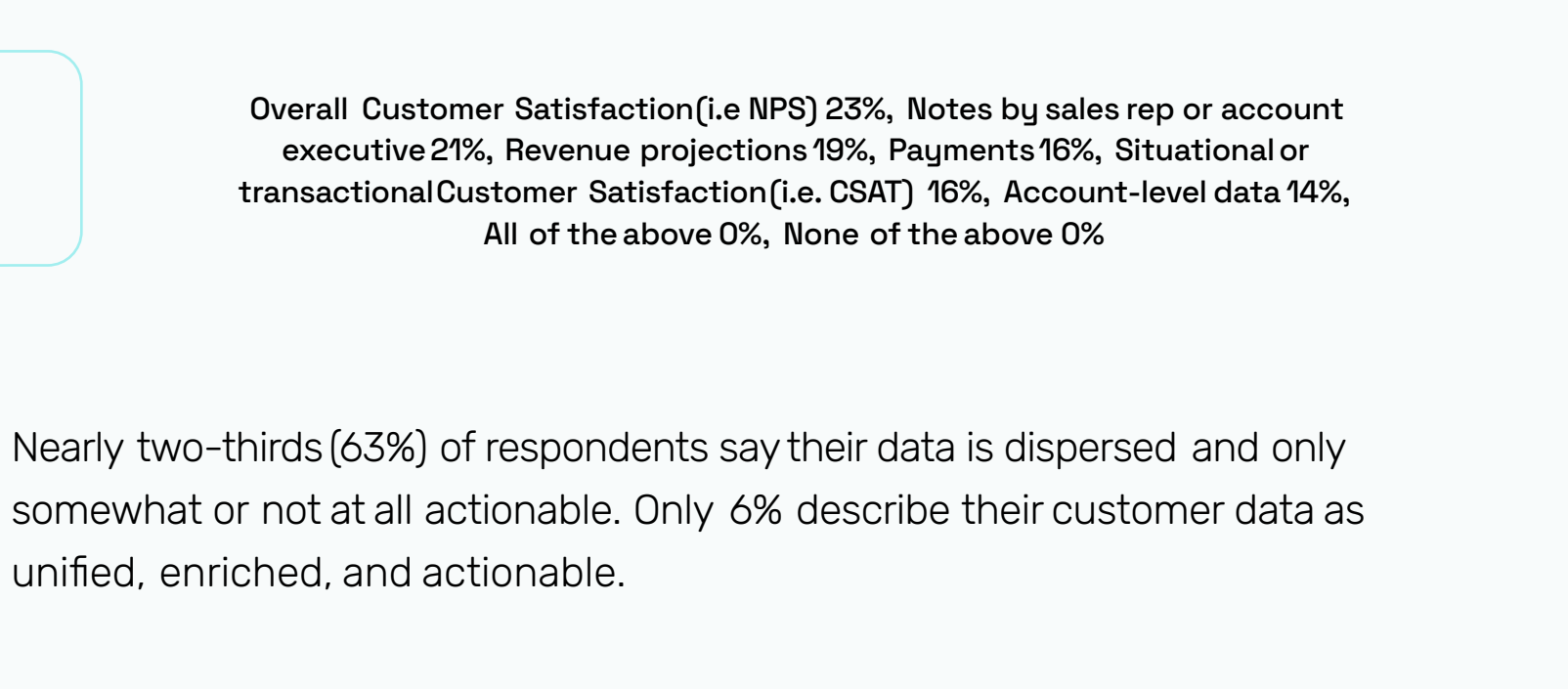
Which area of your Customer Success department has the most room for improvement?



**Support tickets, in-product behavior, and customer health scores are the most common data points companies are tracking, but dispersed data poses a challenge.**

Opportunity exists for better customer data, as no respondents indicated they track all listed metrics. The most common data point tracked is support tickets, cited by 38% of respondents.

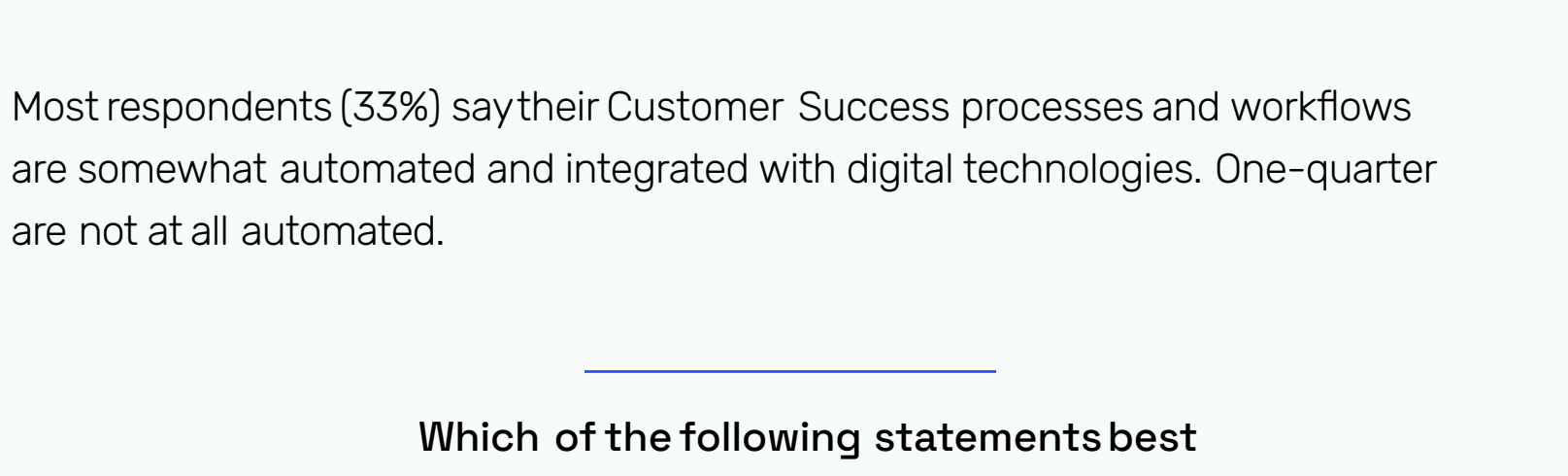
Which of the following types of customer data points are you currently tracking?



Overall Customer Satisfaction (i.e. NPS) 23%, Notes by sales rep or account executive 21%, Revenue projections 19%, Payments 16%, Situational or transactional Customer Satisfaction (i.e. CSAT) 16%, Account-level data 14%, All of the above 0%, None of the above 0%

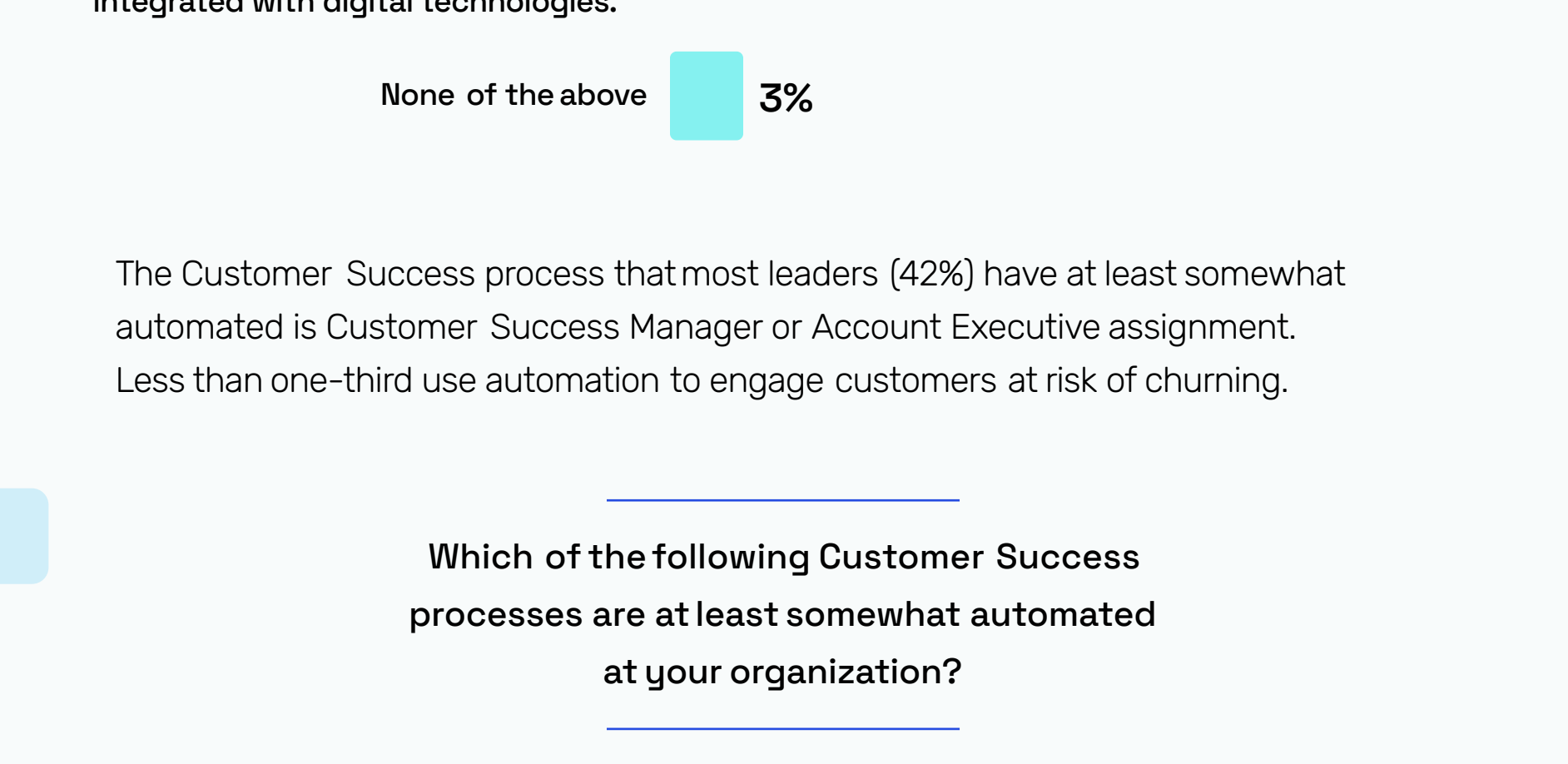
Nearly two-thirds (63%) of respondents say their data is dispersed and only somewhat or not at all actionable. Only 6% describe their customer data as unified, enriched, and actionable.

Which of the following statements best describes the state of your customer data?



Most respondents (33%) say their Customer Success processes and workflows are somewhat automated and integrated with digital technologies. One-quarter are not at all automated.

Which of the following statements best describes your Customer Success processes and workflows?



The Customer Success process that most leaders (42%) have at least somewhat automated is Customer Success Manager or Account Executive assignment. Less than one-third use automation to engage customers at risk of churning.

Which of the following Customer Success processes are at least somewhat automated at your organization?



## Respondent Breakdown

