

Executive Search

Case Study

Director, Customer Success

For a growing B2B SaaS Platform

Technology Practice

Background

Our client is a B2B SaaS organization head-quartered in India and building a machine learning-based predictive logistics platform for businesses to execute, track, collaborate, predict, and optimize the movement of goods with real-time visibility.

What was the exact ask/ role specification

The client was looking to hire a Head of Customer Success Management who would be responsible for driving success for the customers and ensuring that they reach their desired outcomes from the platform's usage. The client had an existing Customer Success team which was decentralized and reporting to the business heads for their geographies. The client was looking to centralize the function and hence were looking at a leader who could lead this existing team, grow the team, and lead the Customer Success charter and vision.

This role reported to the President of Sales and was based out of National Capital Region (NCR), India.

The process

We started the mandate by working closely with the hiring manager to detail out the roles, responsibilities and the KRAs for this role. The second step was to identify the target set of organizations. There were 3 sets of organizations identified – immediate competitors, young SaaS organizations and consulting organizations. The candidate pool was also divided into 2 sets of candidates – the 1st set were candidates playing the role of Customer Success leaders in their existing roles and the 2nd set were candidates who were management consulting professionals specializing in logistics, procurement and / or supply chain.

Post these initial steps, we kicked off the search by presenting a long list of 20 potential candidates from the defined universe. The hiring manager and the PeopleAsset team discussed each candidate and their potential fitment in detail and shortlisted candidates from this pool. This step greatly enabled the PeopleAsset team to understand the thought process that the client displayed while reviewing candidates. This enabled us to fine-tune our search as well accordingly. We turned around with a set of 6 profiles over a 2-3 week duration of which the 2 candidates went through multiple discussions, each of which lasted on an average of 2 hours. The hiring process also included a case study round which focused on conducting a mock QBR as well. 2 of the candidates also underwent final round discussions with the Founder, CEO.

At this point of time, i.e. a month into the process, the client decided that it might be important for them to focus on partial consolidation/centralization before embarking on the journey towards complete centralization. In the light of this decision, they decided to downsize the mandate to a Director, Customer Success who will manage a team focused on a few important geographies instead of the entire function.

PeopleAsset understood the evolving thought process at the client's end and decided to focus on presenting a new set of candidates for this mandate. In a matter of a couple of weeks, PeopleAsset turned around with 4 candidates whom the client interviewed, and one of them was chosen for an offer for this role with another candidate identified as a back-up.

Our evaluation of the candidates was focussed on key aspects such as:

- Understanding the existing KRAs of the candidate and their achievement over the years against them
- The software Annual Recurring Revenue (ARR) managed, the number of clients managed, the type of clients managed (SMB or Mid-Market / Large Enterprise segment)
- The client industries and the customer personas managed and examples of the real time challenges while working with demanding customers.

The chosen candidate brought in more than 16 years of total experience in the space of Customer Success, Strategy & roadmap creation, project & program management. He had the experience of working with large as well as start-up organizations which helped bring in a stable and mature point of view on how to create high performing teams and manage global customers.

PeopleAsset differentiator

- Quickly aligned with the client's need in both the first and the second phase of the search when the client changed their ask and PeopleAsset had to go after a completely different set of candidates.
- Deep understanding of the client's product and business model which enabled deeper evaluation so that every candidate presented to the client was a right fit. The client did not want to miss out on any conversations and felt that every discussion was a huge value add for themselves.
- Deep and constant engagement with the hiring manager and the hiring team to ensure that all parties were on the same page and there were no gaps in communication at any point during the entire engagement.