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Article

Managing Customer Success: An Evolutionary Process Model for Role Development in SaaS Entrepreneurial Ventures

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Online-Appendix zu

„Managing Customer Success: An Evolutionary Process Model for Role Development in SaaS Entrepreneurial Ventures”

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A Interview Guideline for semi-structured Interviews

Grey Text: Explanation of the question, where necessary

Blue Text: Iteration after pilot interview

Notice that this interview is confidential, the name of the company will be anonymized within the thesis and name of the interviewee will not be named. Recording will be done for academic purposes to revisit and have documentation to visit back. Do I have your consent? → If yes, start recording.

Part 1: Descriptive information on customers & the customer management processes

Time:

1. Verify researched information on interview partner Data from the internet, understand the software solution
2. How many customers do you have and which industry/industries are they from? How does your customer portfolio look like?
3. How do you acquire new customers? How do you select and prioritize them?
4. How do you manage your customers after selling an initial software license? What is the business model?
5. How do you ensure that customers stay with you?
6. How do you make sure users at the customer company use your solution? Is your customer equal to your users? Assess user engagement
7. Is there any difference for different customers when you serve them?

How have these processes changed over time? Was it always like this? Has it evolved? Did you have a Roadmap? Incorporate longitudinal view (being careful for justification of past events by interviewee)

Part 2: Descriptive on customers & serving processes + verify general data (evaluative)

Time:

8. How would you define customer success / what does customer success mean to you? (if it does) → Incorporate Timeline again
9. Do you have a customer success manager / department? If yes, how many FTEs, since when, how many customers per CSM, how is the portfolio – how big are the customers that have a CSM? How do you collaborate/connect with other departments?
10. Do you use metrics to measure customer success? If yes, which?

Part 3: Own perception of market and industry & challenges, but also perception of themselves
(Who do you think you are, what is your identity?)

11. Who do you think you are as a company? How would you define yourself and your market?
define boundaries
12. Where do you see yourself in your market, do you have any competition? If yes, which companies (no name needed, but how do you perceive them?) Perception of themselves and their competition → Self Identity + position
13. What is unique about you and your industry? → Goal to find a match or systematic differences among companies
14. What is your competitive advantage in customer management? Which challenges do you face dealing with your customers?
15. How do you see yourself adding value to customers (in different industries)? → which problem do you solve, why are they paying you for this and why do they choose you?
16. Look at your customer: is there anything specific you look out for dealing with customers?
What is something you do with every customer?
17. Do you have anything else you would like to share?