



Process for Customer Success Survey Program Management



GAVS Technologies N.A., Inc

116 Village Blvd, Suite 200, Princeton,

New Jersey 08540, USA.

<http://www.gavstech.com/>

Action	Designation	Name
Prepared By	Lead Executive – Quality	Rama Vani Periasamy
Reviewed By	Head - Quality Assurance	Sekar T
Approved By	Head - Quality Assurance	Sekar T

Change History

Version No.	Release Date	Process Improvement Proposal Reference No.	Summary of Changes	Prepared By	Approved By
2.0	12/5/2019	Initial Document	Initial draft	Rama Vani Periasamy	Sekar T
2.0	12/9/2019	Update	Add the Record/Mention of ISO 20000-1:2018 Clause reference number	Rama Vani Periasamy	Sekar T
2.1	22/7/2020	Update	Added Terms section	Rama Vani Periasamy	Sekar T
2.2	23/7/2020	Update	Updated Scope statement	Rama Vani Periasamy	Sekar T
2.3	10/11/2021	Update	Introduced 5 CSS questions for Premier	Vijesh	Sekar T
2.4	23/2/2022	Update	Annual Review - No changes	Vijesh	Sekar T
2.5	20/06/2023	Update	Annual Review - No changes	Vijesh	Sekar

Version No.	Release Date	Process Improvement Proposal Reference No.	Summary of Changes	Prepared By	Approved By
2.6	20/06/2024	Review and Update	Annual Review and updated the following. RACI, Process Flow and Appendix	Dhiviya & Thamarai	Sekar
2.7	07/08/2024	Update	Appendix updated with steps to capture Customer Success Survey feedback on behalf of Customer	Dhiviya & Thamarai	Sekar

Contents

Section A: Introduction	7
1. Overview	7
Qualitative Customer Success Analysis	7
2. Process Objective	7
3. Standards/Models Reference	7
4. Scope	8
5. Policy	8
6. Key Terms and Definitions	8
7. Process Requirements	8
Section B: Roles and Responsibilities	10
1. RACI Matrix	10
Section C: Process Flow	11
1. High-level Process flow of Customer Success Survey Program management	11

Section A: Introduction

1. Overview

Customer Success survey (CSS) is a tool used to measure how satisfied and successful customers are with the products/service delivered by GAVS. By obtaining a CSS score and taking steps to improve it, we can increase customer satisfaction & customer success and thus loyalty.

Every Customer Success survey provides two data points. The qualitative and quantitative.

The quantitative part is the actual “Customer Success score” Which is calculated with a simple calculation:

“To calculate Customer Success, take the number of customers who rated you 3, 4 or 5 and divide that by the total number of responses and multiply by 100 to get a percentage. For example, if you surveyed 100 customers, and 45 gave a score of 4 or 5, your Customer Success score would be $45/100 = 45\%$.”

CS Score is calculated as follows

Customer Success score = (Positive rating/Total survey response) * 100

Qualitative Customer Success Analysis

The qualitative part of your Customer Success Survey results is the free text box which could also be actionable customer insights. Whether it's NPS, CSS Criteria, your support conversations, the qualitative free text box provides the best opportunity to understand customer feedback at scale..

2. Process Objective

Customer Success is important for businesses to discover a variety of insights such as what are customer pain points, what are competitors doing better, etc. These insights will then translate into opportunities to improve customer satisfaction and drive critical business decisions

3. Standards/Models Reference

Model / Standard	Process Area reference / ISO Clause(s) no.
ISO 9001:2015	9.1.2 - Customer Satisfaction
ISO 20000-1:2018	8.3.2 - Records of Service Complaints
ISO 45001:2018	10 - Improvement

4. Scope

Applicable for all managed service delivery engagements, T&M engagements where GAVS is responsible for service delivery management and deliverables and Staff Augmentation where GAVS is responsible for providing Talents/People.

5. Policy

Customer Success Management Policy shall help in minimizing risk and impact to customer(s) and other interested parties.

1. Customer Success Manager shall ensure that service delivery managed through the applicable processes and system driven approach across (Project Initiation to Project Completion) the service delivery life cycle
2. Start of every engagement, Customer Success Manager shall conclude with customer contacts on the following but not limited to these core processes
 - a. Governance mechanism on the Service Delivery performance - Keep track of KPI performance through Customer Success Management Platform or alternate mechanism/tools if any

- b. Sharing the GAVS's Standard QBR/MSR Report and finalize the format
 - c. Brief about the Customer Success Survey Program, objectives and survey questions and process of tracking feedback & reporting the progress on the improvement plan and its effectiveness
3. Client Partner / Customer Success Manager shall ensure customer success goals & targets are captured at the start of the engagement and consistently monitored throughout the service delivery life cycle to achieve customer success score of 4 and above.
4. Any concern(s) raised by customers shall be acknowledged / responded within 8 business hours. Plan for resolution shall be communicated to customers within two business days.
5. In case of CSS feedback given by a customer, CSM shall ensure that the improvement plan is submitted within seven days from the date of CSS feedback received. Improvement plan shall have the following timeline 30 days - 60 days - 90 days where improvement plan action items goes beyond 30 days.

6. Key Terms and Definitions

CSS - Customer Success Survey

CSI - Customer Success Index

7. Process Requirements

Accounts / Projects eligibility Criteria for Customer Success Survey :

Eligible Criteria :-

All types of projects

- Project has more than 3 headcount
- Project is minimum of 3 months old from the project start date
- If project closure is during the quarter and if services delivered for minimum of 2 months in the quarter

If project closure is during the quarter and if services delivered are less than 2 months, then previous quarter CSS to be considered.

Ineligibility Criteria: (SKIP Customer Success Survey):

- Head count less than 4
- Service delivery closed in previous quarter (or before 3 months), but project is open for any other purpose like billing etc.,
- Projects are covered/clubbed under other projects/taken at Account level.

Project Managers/Customer Success Managers need to send a request to SKIP CSAT with justification in the CSM platform for approval, in case of any of the above eligibility criteria.

Supplier:

Customer Success manager, Project Manager.

Input:

CSS Survey from CSM Platform or discussion from Free Flow conversation

Process:

S.No.	Process Activity	Process Steps	Responsibility
1	Gauge Customer perception	<p>Each business unit / practice head shall make an effort to obtain customer perception of its services through actions such as</p> <ul style="list-style-type: none"> ● Meetings with clients ● Customer feedback through an email /letter of appreciation or satisfaction ● Customer complaints, if any ● Repeat orders ● Obtaining feedback on structured questionnaire 	<p>All BU Heads All Practice Heads Customer Success Managers Project Managers</p>
2	Evaluation of Customer Success Survey feedback & Analysis	<p>After obtaining the feedback from the customer, in format of Customer Success Survey questionnaire, the Customer Success Score / Index shall be calculated as mentioned above</p> <p>Record of CSI evaluation and analysis shall be maintained by the concerned BU & Practice Head</p>	<p>All BU Heads All Practice Heads</p>
		In all such cases where adverse feedback	All BU Heads

		<p>received from the customer, its cause(s) shall be investigated and appropriate corrective action shall be taken. This shall include a rating of less than 4 for any of the parameters given in the customer success survey questionnaire or when the customer success index is less than 70%</p>	<p>All Practice Heads Customer Success Managers Project Managers</p>
		<p>Concerned practice heads (vertical heads) shall compile a report of assessment of customer perception of the respective BU services and action taken with respect to any complaint or adverse feedback received</p>	<p>All Practice Head</p>
<p>3</p>	<p>Customer feedback through Customer Success Management platform</p>	<p>Customer Contact setup, CSS configuration and Validation in CSM platform to be done before the end of the last month of the quarter. Validation is done by approving or rejecting the customer contact by responding to email triggered from CSM Platform. CSS Triggered from the CSM platform automatically within 10 days of the first month of the subsequent quarter to Customer Contacts which are validated in the CSM platform. An automated email reminder would be sent to Customer contact on the 4th day from the date of CSAT triggered from the CSM platform.</p>	<p>Project Manager/Customer Success Manager</p>
<p>4</p>	<p>Customer feedback through Customer Success Management platform</p>	<p>Customers can send their feedback/complaints directly through CSM Platform. Information about this facility shall be publicized to all the customer contacts when customers are on-boarded into CSM Platform. Customer feedback collected through other means shall be registered in the CSM Platform and action taken on that feedback shall be tracked and communicated to customer</p>	<p>BU Head Practice Head Customer Success Manager Project Manager</p>

5	Alternative way of Gauging Customer Response	<p>If CSS response is not received until day 7, an automated email reminder would be sent on the 7th day to CSM and Client partner for further follow up (with Project Manager or Customer directly). CSM shall discuss with the client to get the customer perception and log it in the CSM platform or CSM may also choose to use the CSS questionnaire to get CSS score and feedback.</p> <p>CSS Link will be valid till the end of the month or 20 calendar days whichever is later.</p> <p>If a minimum of one response is not received for the project, in any means till the end of the month , risk gets created in CSM platform at project level which needs to be closed by Project Manager upon getting feedback from Customer.</p>	Customer Success Manager, Project Manager
6	CSS Improvement Plan	<p>If CSS response is received from the client ,then the Action Item would be auto created for Criteria < 4 or NPS < 9 in CSM Platform</p> <p>Where required, Project manager/CSM/Client partner needs to connect with Customer for clarity in the feedback given to come up with the improvement plan and submit to Customer within 7 Calendar days of the CSS response received date. Improvement plan for action items have to be approved by CSM in CSM Platform. CSM platform sends the communication to Customer contact on the improvement plan after the plan is approved by CSM in CSM platform.</p> <p>Action plan should be implemented within 4 weeks from the date of CSS feedback received. In case, the action item target date extends beyond 30 days, the timeline shall be within 30 days, 60 days and 90 days.</p> <p>Where the action plan cannot be implemented within 4 weeks, approval from BU Head / Practice Head shall be</p>	Customer Success Manager, Project Manager

		<p>obtained proactively as part of the improvement action planning stage. Implementation status of CSS Improvement / action plan has to be communicated to Customer as part of service delivery governance / cadence calls (Monthly Status Review or Quarterly Business Review). Concurrence and feedback on effectiveness of improvement plan implementation to be obtained from Customer by CSM or PM</p>	
7	Quarterly Customer perception analysis report	Based on the information collected from Practice Head, CSM Platform and other means, quarterly analysis on customer perception shall be shared with Leadership Team	BU Head
8	Validation of Customer perception data	<p>Data collected on customer perception shall be validated as follows</p> <ul style="list-style-type: none"> a. Verbal feedback collected by Project Manager shall be confirmed by Client Partner or Customer Success Manager based on their interaction with the customer, facts in the emails etc., b. Feedback, complaint, appreciation received in writing / email shall be acknowledged in writing by the BU Head/Practice Head 	Client Partner / Customer Success Manager
9	End to end CSS Process Tracking	<ul style="list-style-type: none"> a. Verify onboarding of customer contacts and CSS configuration for all Accounts/Projects/Portfolio. b. Ensure Customer contact verification for all Customers. c. Tracking of CSS Response (Received/not received) and discussion with Customer by CSM to get Customer Response /perspective after 7 days of CSS sent date d. Publish the dashboard by Vertical (Infra, ADM, and Overall) on CSS insights. 	Process Excellence Team

10	Tracking of process compliance for respective Accounts	<ul style="list-style-type: none"> a.Ensure Customer contact verification for respective Customers. b.Tracking of CSS Response (Received/not received) and discussion with Customer by CSM to get Customer Response /perspective after 7 days of CSS sent date. c.Tracking of submission of improvement plan and implementation of improvement plan. 	Delivery Excellence Team

Output: CSS response with score and feedback from Customer, Improvement Plan submission and Implementation.

Customer: Customer Success Manager, Project Manager

Section B: Roles and Responsibilities

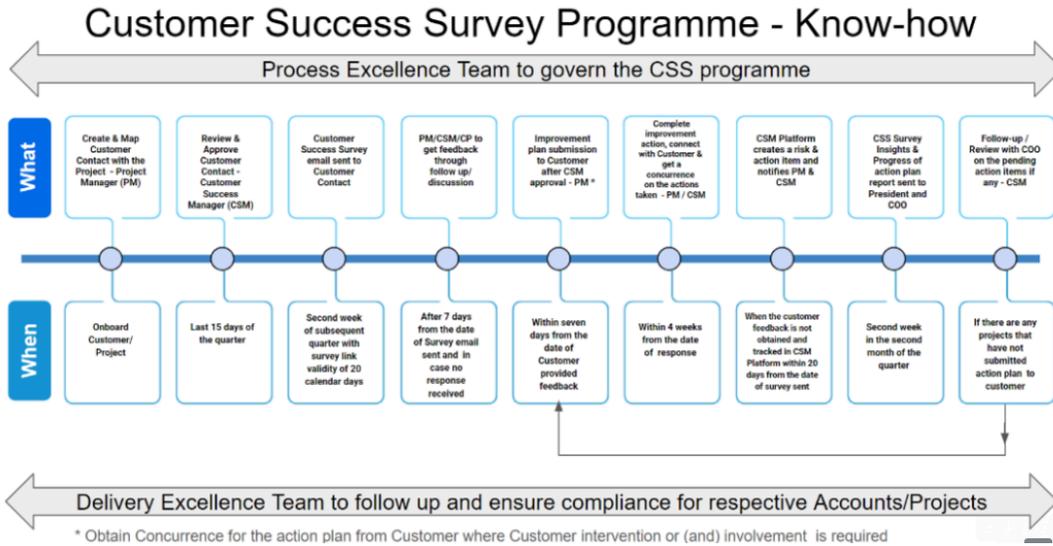
1. RACI Matrix

The following RACI chart outlines which positions are Responsible, Accountable, Consulted, and Informed for each process.

Sr. No	Activity Description	Project Manager	CSM	Customer	CSM platform Team	Quality Team	COO
1	Contact setup, CSS configuration and verification in CSM platform	R	A	I	I	I	NA
2	CSS Trigger from CSM platform in the 1st week of subsequent quarter	I	I	I	AR	I	NA
3	CSS response	R	A	R	I	I	NA
4	CSS Response followup	R	A	I	I	I	NA
5	Submission of Improvement plan	R	A	I	I	I	NA

Sr. No	Activity Description	Project Manager	CSM	Customer	CSM platform Team	Quality Team	COO
6	Implementation of Improvement plan	R	A	I	I	I	NA
7	Discussion with customer to gauge customer perspective	R	A	C	I	I	NA
8	Quarterly review and interim Review	R	R	NA		R	A
9	Action Items from Review Meetings	R	R	NA	R	R	A

Customer Success Survey - Roadmap:



Appendix:

CSS Client Contact Verification Process:

Responsibility: The Project Manager and CSM is responsible for verifying CSS Customer contacts in the CSM portal.

Verification Steps:

Open a WEB Browser

Launch a web browser on your computer or device.

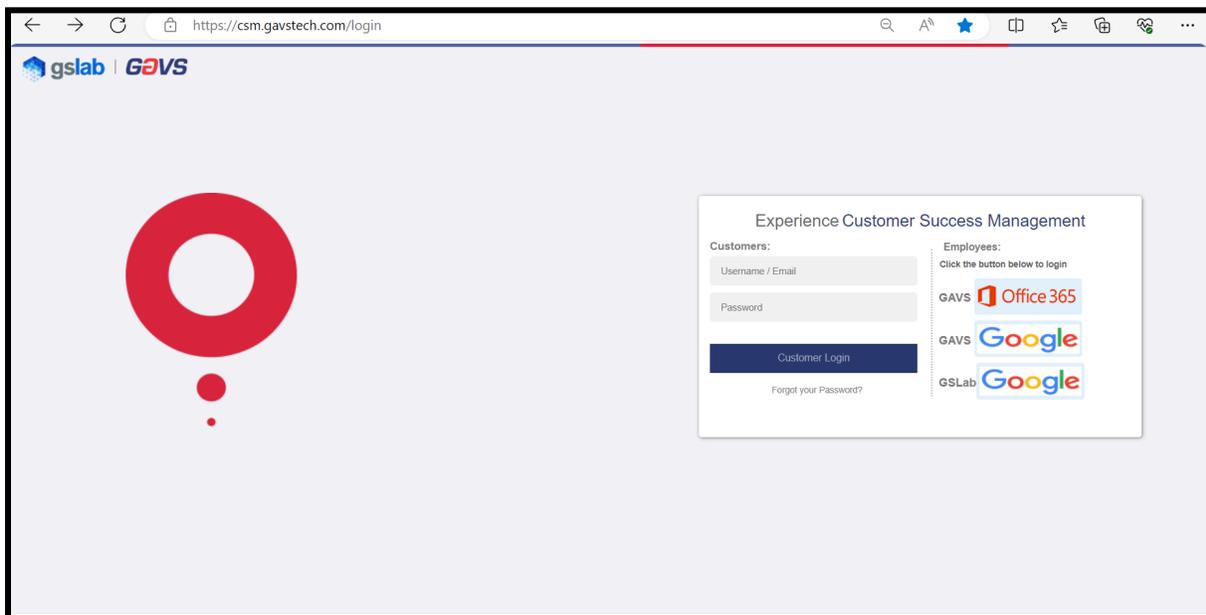
Enter the URL:

In the address bar of the web browser, type the URL provided for accessing the system.

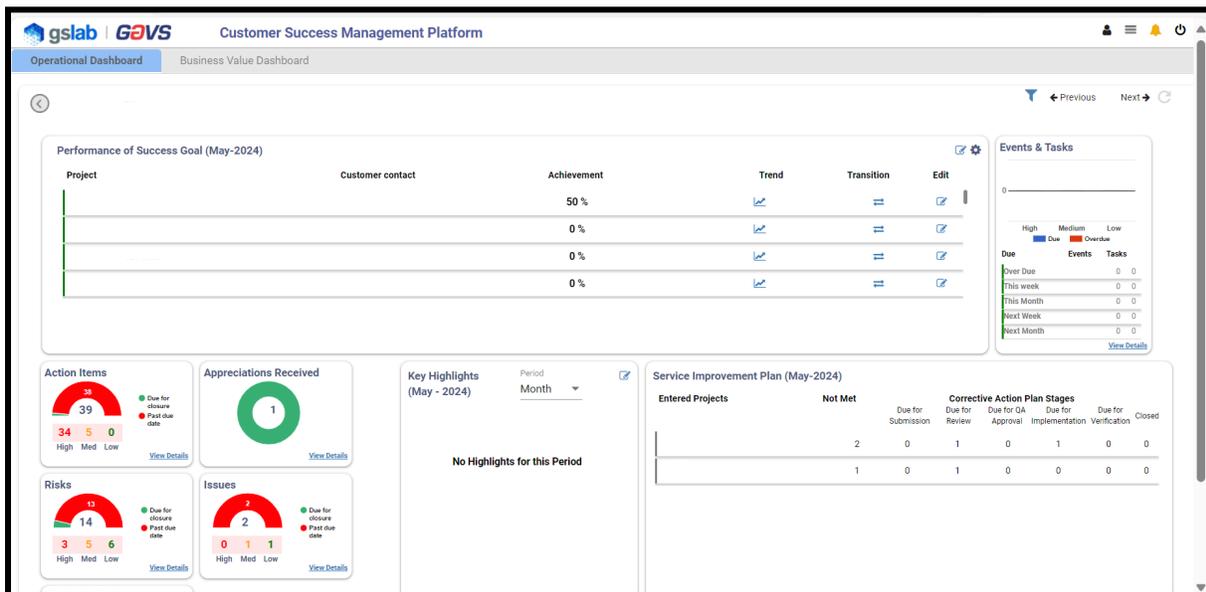
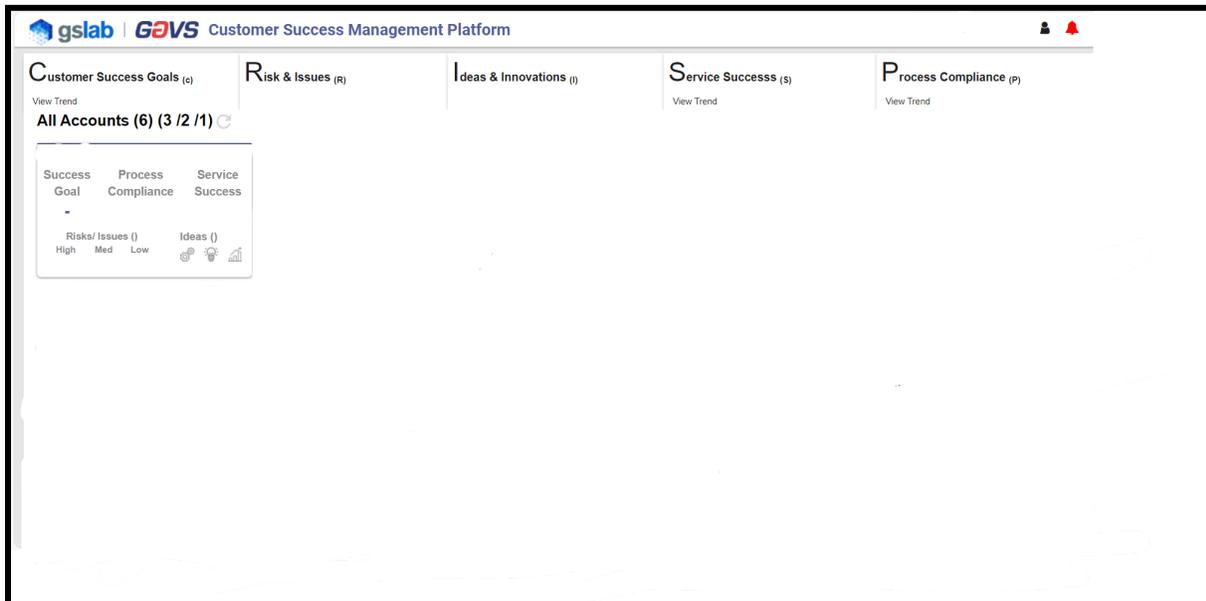
Example: "<https://csm.gavstech.com/login>".

Press Enter:

Click "GAVS Google" option to navigate to the URL.

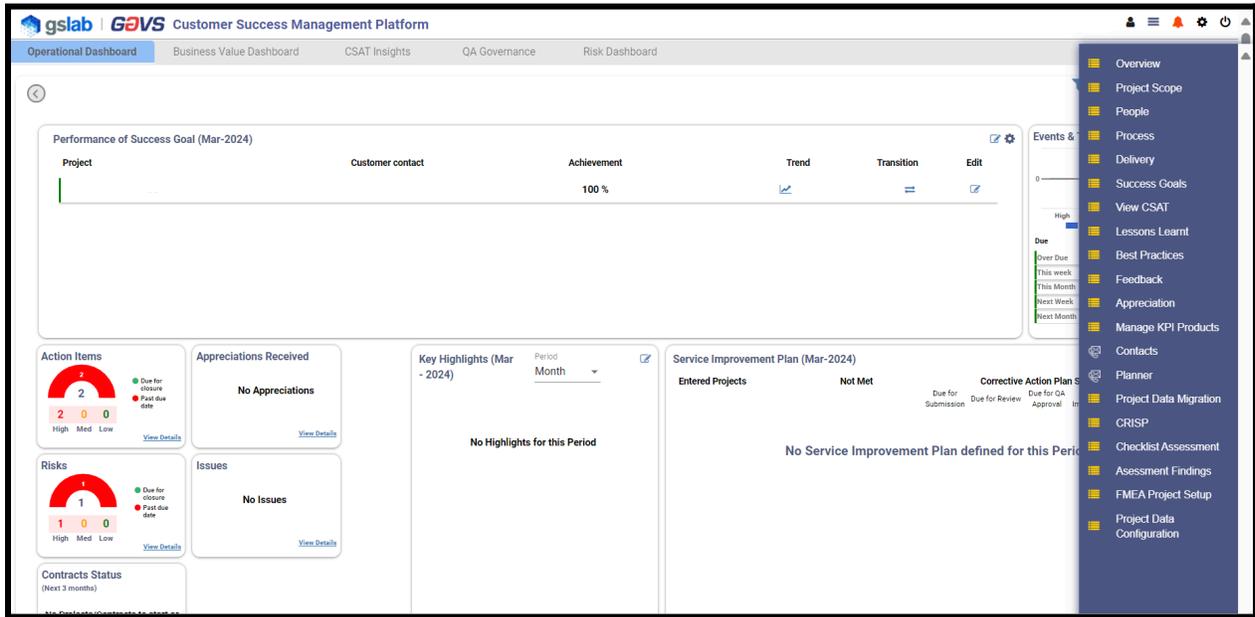


Click Project Dashboard Icon:

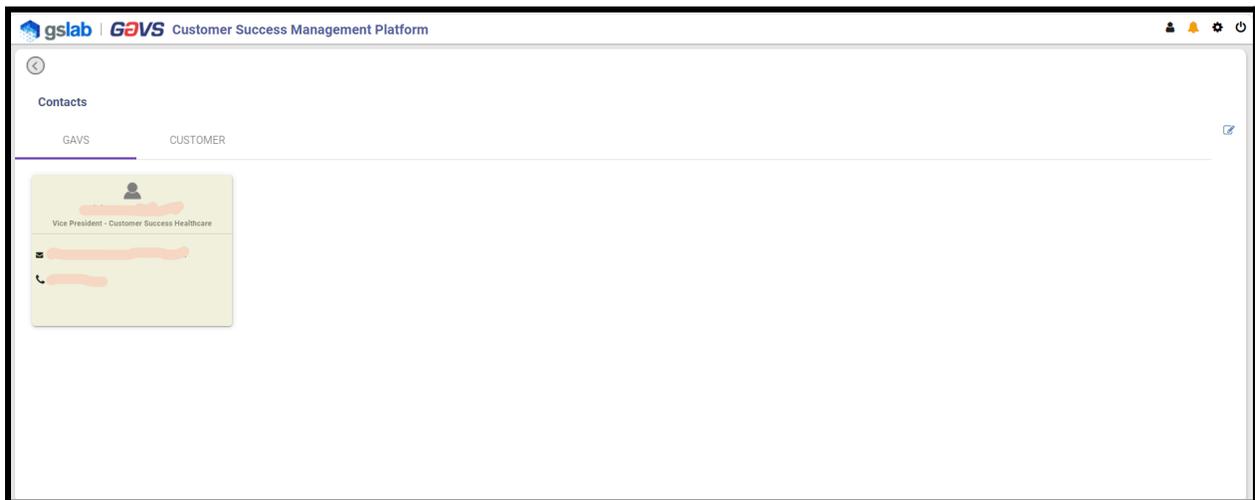


Click Hamburger in the Operational dashboard.

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Select Contacts option.



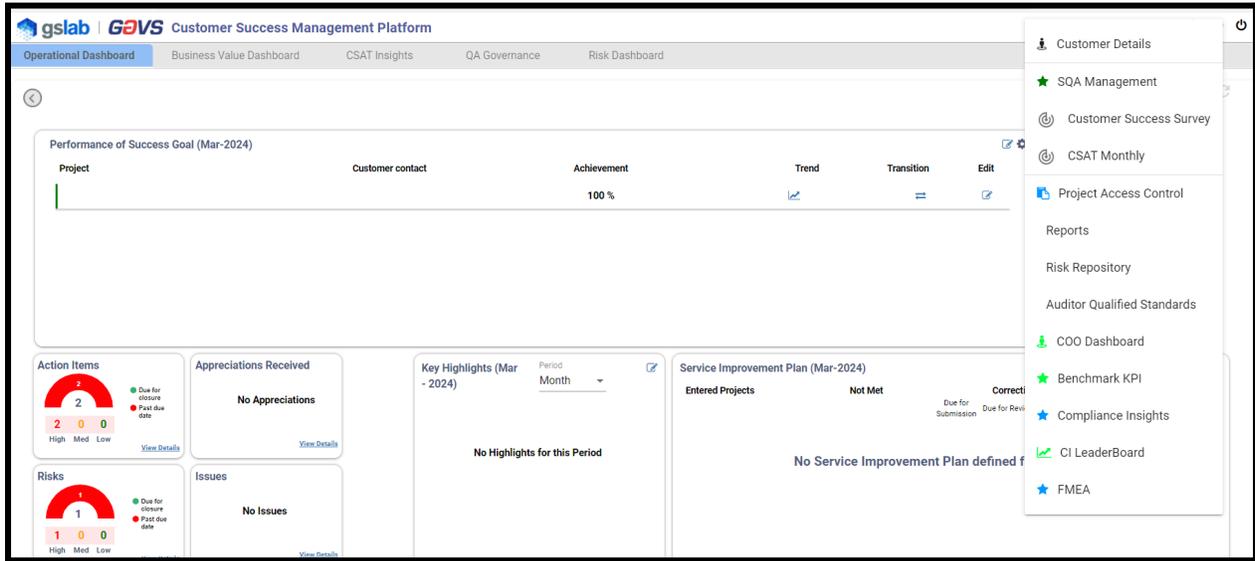
Click Edit option to update the GAVS contact under GAVS Dashboard.

Customer contacts can be updated in the Customer Dashboard.

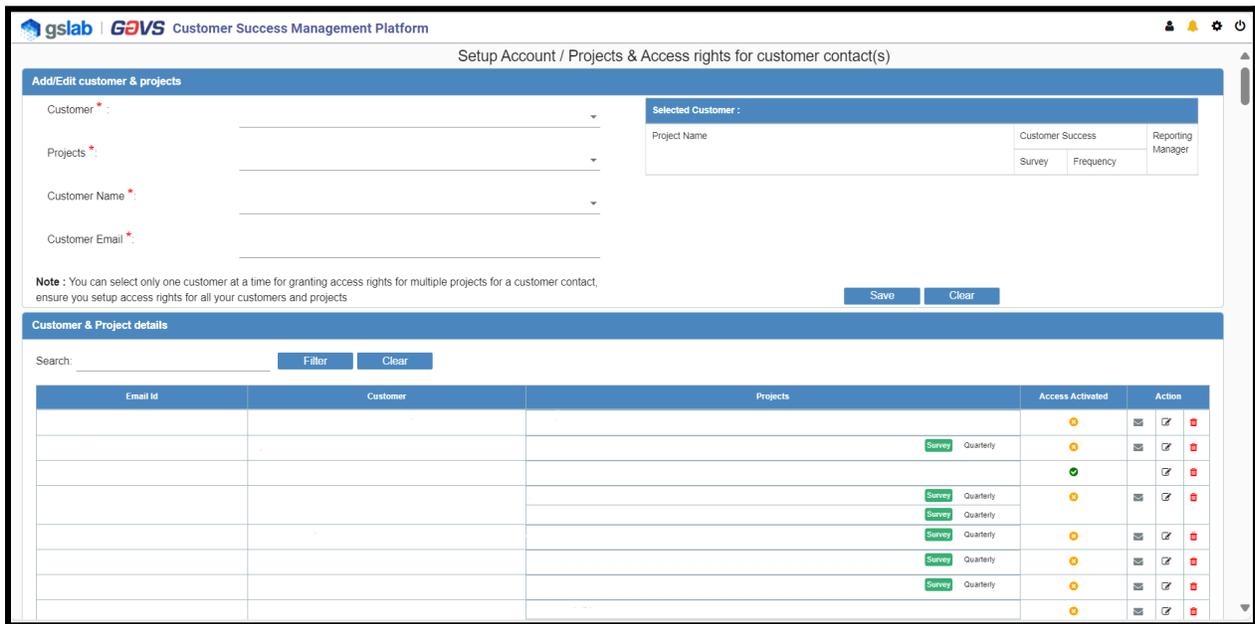


Click Settings.

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Select Customer Details.



Select Customer, Project and Update Customer name and contact Email Id.

Upon selecting and updating Customer, Project and Update Customer name and contact Email Id, check box would be enabled for Survey and reporting Manager.

Selected Customer : [Redacted]			
Project Name	Customer Success		Reporting Manager
	Survey	Frequency	
	<input type="checkbox"/>	▼	<input type="checkbox"/>

Check the boxes to enable the contacts as contacts for CSAT response.

Select the required frequency (Ex. Monthly, Quarterly).

Click Save.

The CSS Contact Verification needs to be done before the first week of the first month of the subsequent quarter. It is done through email.

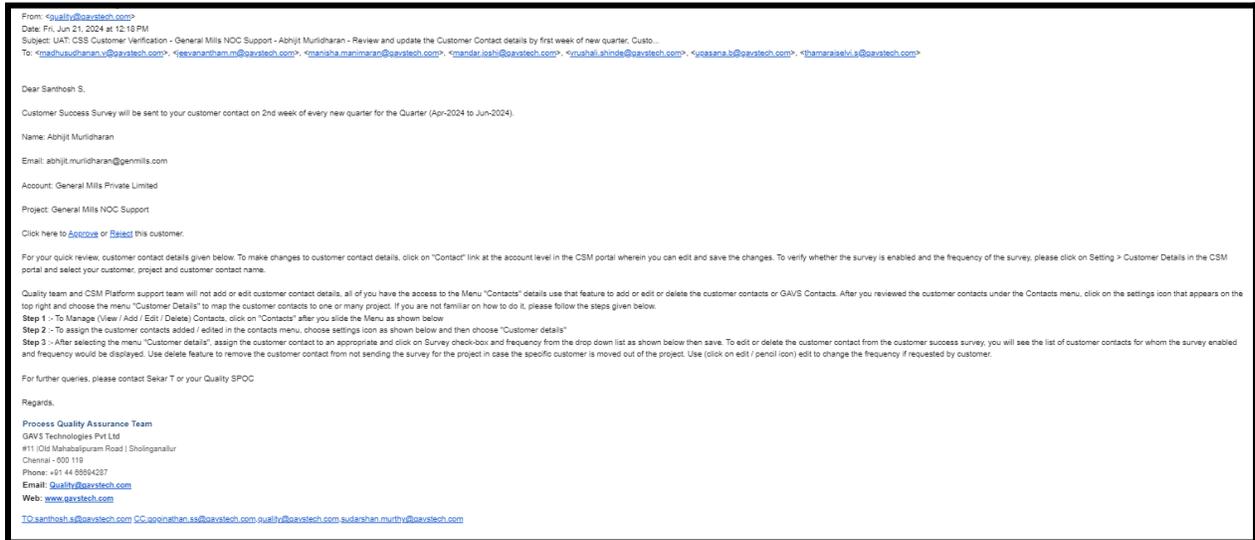
CSS surveys will be triggered within 10 days of the first week of the subsequent month.

To Approve/Reject Customer Contact:

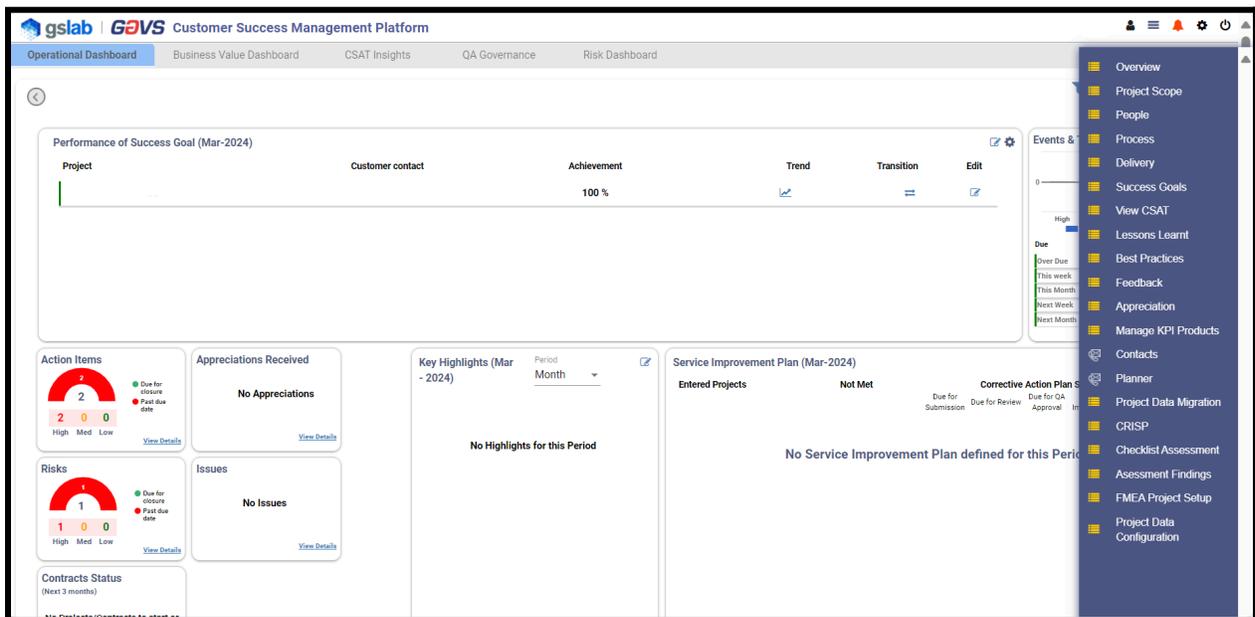
In the last month of the quarter, email would be sent to all CSMs, Project managers to validate the existing CSS contact.

Project Managers/CSM can approve or reject the current CSS contact in the email.

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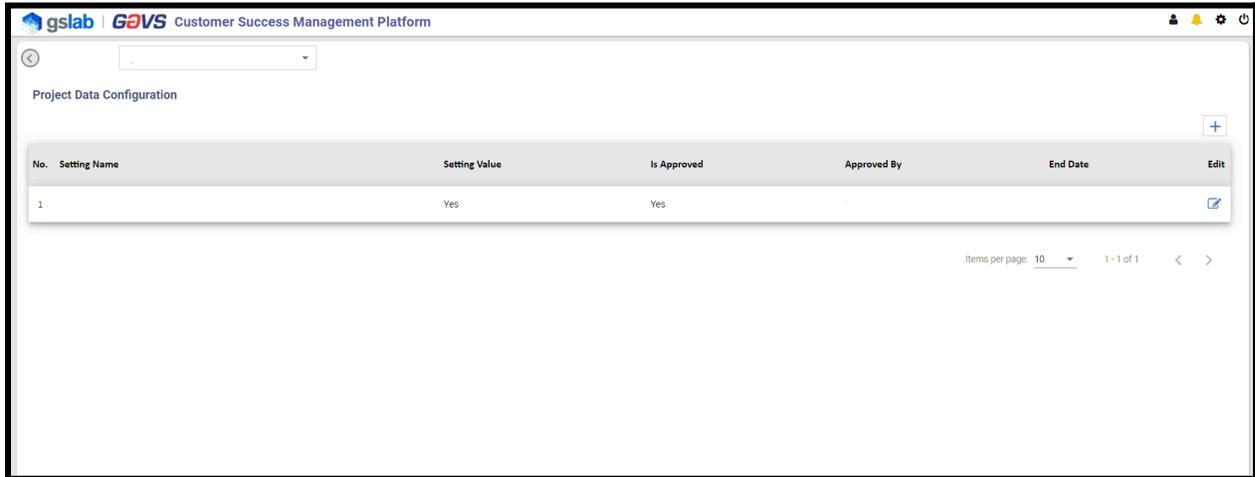
Excluding CSS for Customer:



Click Hamburger.

Select Project Data Configuration.

GAVS: Standard Practice for Customer Success Survey (CSS) Program Management



gslab | GAVS Customer Success Management Platform

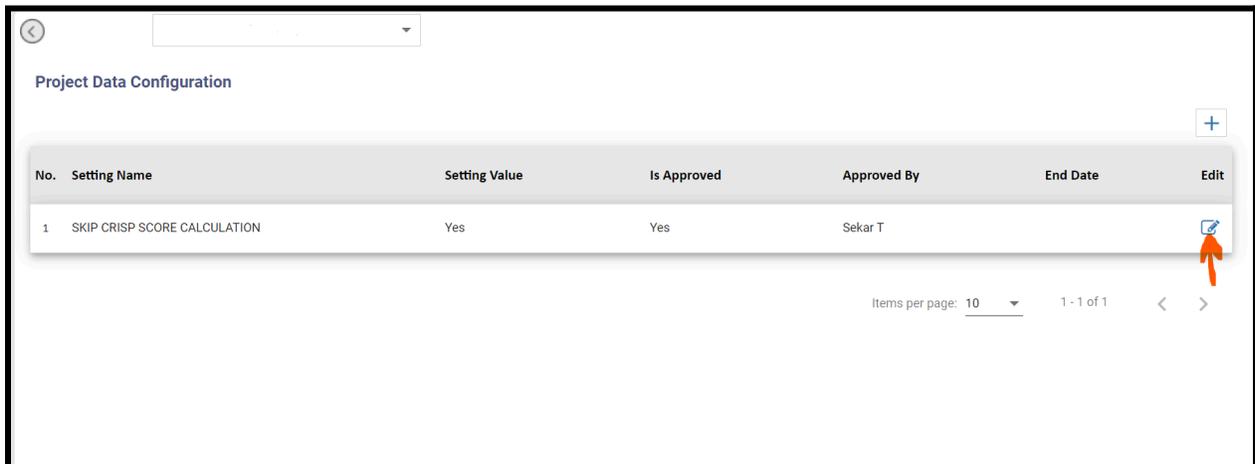
Project Data Configuration

No.	Setting Name	Setting Value	Is Approved	Approved By	End Date	Edit
1		Yes	Yes			

Items per page: 10 1 - 1 of 1

Project Manager can place a request to exclude the project from CSS program with valid justification.

Post Approval, CSS triggers would be disabled for respective projects in the Account specified.



Project Data Configuration

No.	Setting Name	Setting Value	Is Approved	Approved By	End Date	Edit
1	SKIP CRISP SCORE CALCULATION	Yes	Yes	Sekar T		

Items per page: 10 1 - 1 of 1

If the Project Manager wants to include Project for CSS program, then Project manager can select “Edit” in the line item and choose “No” and submit with relevant comments.

GAVS: Standard Practice for Customer Success Survey (CSS) Program Management

Select Setting
SKIP CRISP SCORE CALCULATION

Choose an option * : Yes No

Comments

Approved By
Sekar T

End Date

Save

Survey Window:

The CSS survey will remain open till the end of the month in which the survey is triggered or 20 calendar days whichever is later

CSS Survey email sample:

From: <Quality@gavstech.com>
Date: Tue, May 2, 2023 at 9:14 PM
Subject: Monthly Customer Success Survey for the period of April 2023
To:
Cc:

Dear Stephanie Harris,

We - **Service Delivery Excellence Team** are conducting the Customer Success Survey for the service provided by _____ team for the month of April 2023. Your feedback will help us to understand our strengths and areas of improvement and improve the quality of service provided. Please spare 5 minutes of your time to fill in the survey, using the link provided below. In case you have any questions on this survey process, please contact Sekar T on +91 4466694287 or at sekar.thanigaimani@gavstech.com

Survey Link: <https://csm.gavstech.com/CustomerSuccessSurvey/c4df0f45-a128-4092-a247-7881279ea04e>

Note: The survey link is best viewed in laptops and tablets using Chrome, FireFox and Edge browsers

Regards,

Service Delivery Excellence Team
GAVS Technologies Pvt Ltd
#11 | Old Mahabalipuram Road | Sholinganallur
Chennai - 600 119
Phone: +91 44 66694287
Email: Quality@gavstech.com
Web: www.gavstech.com

CSS FORM:

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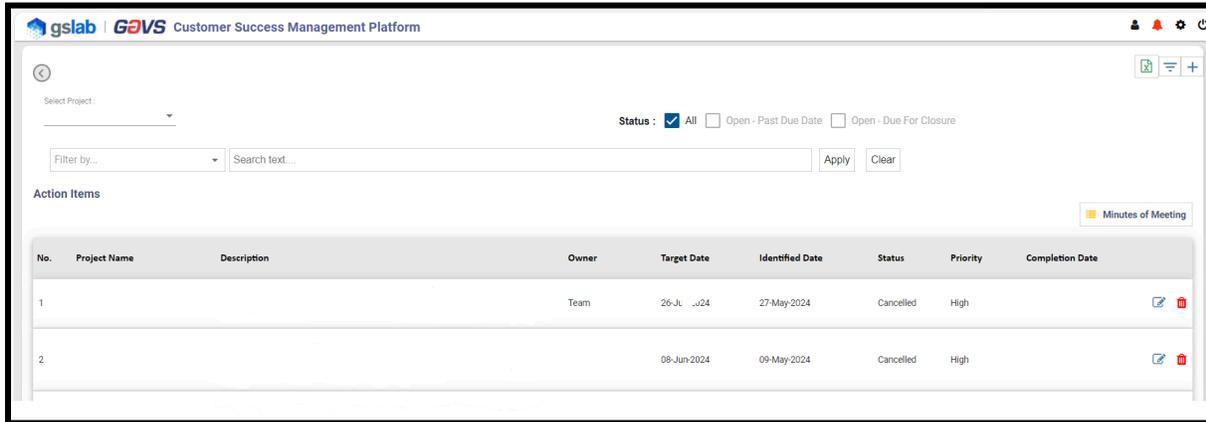
Criteria for Actionable CSS:

- 1.Criteria rated below 4
- 2.NPS rated below 9
- 3.Others with subjective/actionable feedback.

Action plan update Procedure:

In the Operation Dashboard, click "View Details" under Action Items.

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The screenshot shows the GAVS Customer Success Management Platform interface. At the top, there is a header with the GAVS logo and the text "Customer Success Management Platform". Below the header, there is a "Select Project" dropdown menu. To the right, there is a "Status" filter section with three options: "All" (checked), "Open - Past Due Date", and "Open - Due For Closure". Below the status filter, there is a "Filter by..." dropdown and a "Search text..." input field with "Apply" and "Clear" buttons. The main content area is titled "Action Items" and contains a table with the following columns: No., Project Name, Description, Owner, Target Date, Identified Date, Status, Priority, and Completion Date. There are two rows of data in the table. The first row has "1" in the No. column, "Team" in the Owner column, "26-Jul-2024" in the Target Date column, "27-May-2024" in the Identified Date column, "Cancelled" in the Status column, and "High" in the Priority column. The second row has "2" in the No. column, "08-Jun-2024" in the Target Date column, "09-May-2024" in the Identified Date column, "Cancelled" in the Status column, and "High" in the Priority column. There are also "Minutes of Meeting" and "Edit" icons for each row.

No.	Project Name	Description	Owner	Target Date	Identified Date	Status	Priority	Completion Date
1			Team	26-Jul-2024	27-May-2024	Cancelled	High	
2				08-Jun-2024	09-May-2024	Cancelled	High	

Action plan for CSS will be posted as an “Improvement plan”.

Click Edit Option.



The screenshot shows the edit form for an Action Item in the GAVS Customer Success Management Platform. The form has the following fields: "Project Name" (dropdown), "Description*" (text area), "Source Category*" (text area), "Owner*" (text area), "Priority*" (dropdown menu with "High" selected), "Identified Date*" (date picker), "Target Date*" (date picker), "Status*" (dropdown menu), "Completion Date" (date picker), and "Comments" (text area).

Description: Document the action plan that was discussed and approved by the client.

Source Category: Customer Success Survey

Identified Date : Action Plan Created date (CSS response received date)

Target Date:4 weeks from CSS response received date

Status:Status of the Current Action Plan

Completion date:Estimated Completion Date of the Action Plan

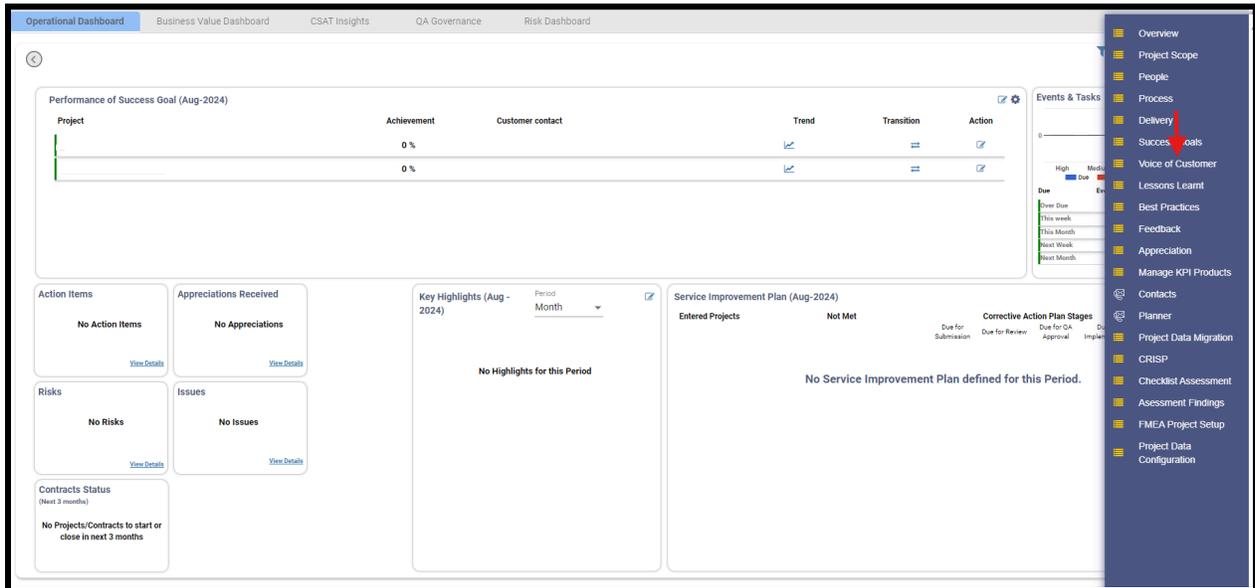
Comments:Additional Remarks if any regarding the Action Plan.

After updating the action plan, the project manager is responsible for driving it to completion by the specified target date.

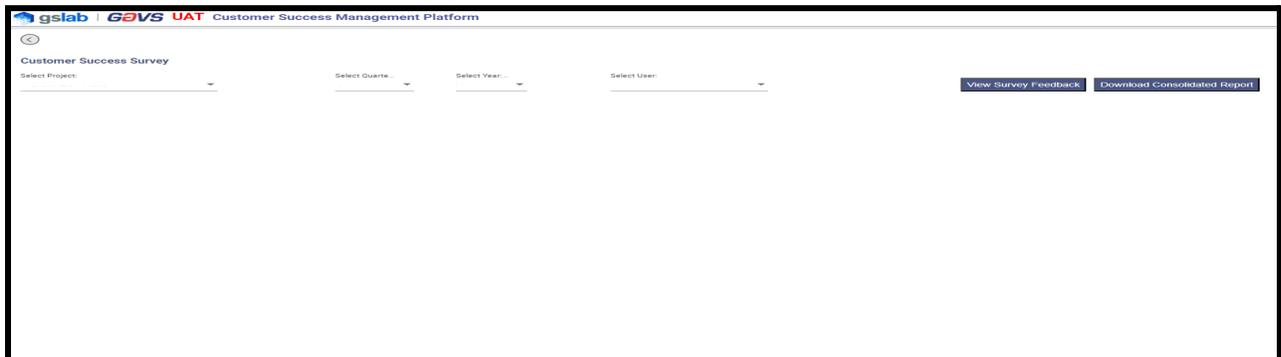
Capture Customer Success Survey feedback on behalf of Customer by Client Partner/Customer Success Manager/Project Manager.

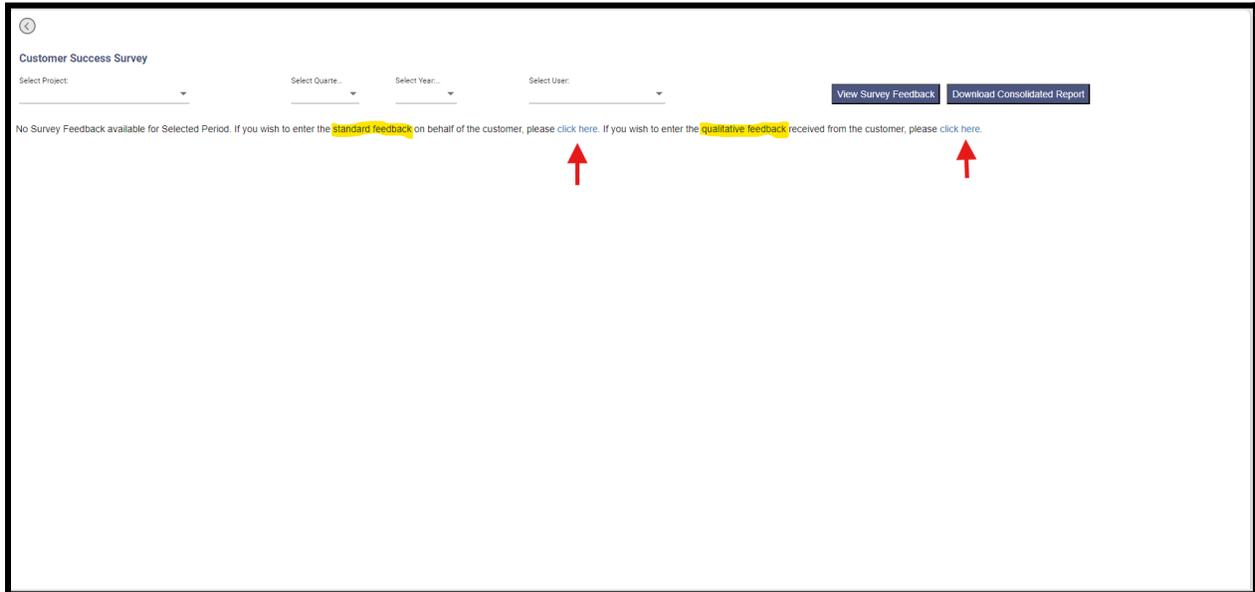
Voice of Customer:

To Capture Voice of Customer- click “Voice of Customer” in Hamburger dropdown available at the right top of Account dashboard in CSM platform.



Select Project, Quarter, Year and Customer Name to capture the feedback on behalf of Customer contact. Click View Survey feedback.





We have 2 options to capture Feedback:

1. Standard feedback - Questionnaire is based on Project Type(Managed Services, Time & Material and Staff Aug)
2. Qualitative Feedback - Information to be collected on Overall rating, strengths and recommendations

Click on the required option.

Use date of meeting field to capture the date in which discussion happened with Customer to collect the Customer Success Survey response.

Standard feedback :

Remarks is mandatory when Criteria score is less than 4 or NPS score is less than 9. Please ensure to capture remarks from discussion with Customer which will help the project team to plan for improvement action.

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Customer Success Survey

Select Project: _____ Select Quarter: _____ Select Year: _____ Select User: _____

[View Survey Feedback](#) [Download Consolidated Report](#)

Client Name:		Project/Portfolio Name:	
Feedback for the period:		Respondent:	

Date of Meeting * Customer Success Manager / Delivery Partner is aware of the client feedback [Click here to view the mail template that will be sent to customer](#)

We would like you to rate GAVS on the aspects mentioned below:

Criteria	Provide your Rating	Remarks
*Overall quality of deliverables / services	☆☆☆☆☆	
*Enabling your success	☆☆☆☆☆	
*Value-adds / Initiatives directly impacting your success	☆☆☆☆☆	

How likely is that you would recommend GAVS to your friend / acquaintance who wishes to avail IT services?

1 2 3 4 5 6 7 8 9 10

Not at all likely Extremely likely

Any other feedback / recommendation that you may like to mention*

* Required information.

Thank you very much for taking time to complete this survey. Your feedback is valued and very much appreciated!

[Submit](#)

Qualitative Feedback:

Customer Success Survey

Select Project: _____ Select Quarter: _____ Select Year: _____ Select User: _____

[View Survey Feedback](#) [Download Consolidated Report](#)

Client Name:		Project/Portfolio Name:	
Feedback for the period:	Apr-2024 to Jun-2024	Respondent:	

Date of Meeting * Customer Success Manager / Delivery Partner is aware of the client feedback [Click here to view the mail template that will be sent to customer](#)

We would like you to rate GAVS on the aspects mentioned below:

Criteria	Provide your Rating	Remarks
*Overall experience from service delivery provided	☆☆☆☆☆	

What do you see as the strength?*

Your recommendations on areas that we should improve or change*

* Required information.

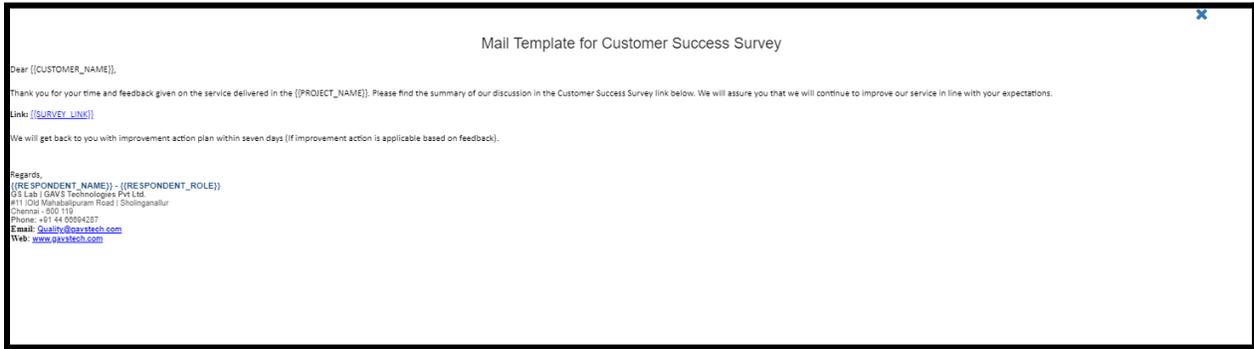
Thank you very much for taking time to complete this survey. Your feedback is valued and very much appreciated!

[Submit](#)

Upon updating the feedback and submitting, email would be triggered to Customer, Project CSM, Project Manager and Quality Spoc.

Email Subject: CSS Feedback submitted by <Project Manager/Customer Success Manager/Client Partner> on behalf of <Customer contact Name> for <Account> - <Project Name> | Feedback

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Action Item would get created for the project if Criteria score is less than 4 or NPS is less than 9.

CSS Survey Questionnaire:

Managed Services - CSS Questionnaire:

Manage Services: GAVS is responsible for end to end project management and deliverables.

1. Overall quality of deliverables / services
2. Enabling your success
3. Value-adds / Initiatives directly impacting your success

How likely is that you would recommend GAVS to your friend / acquaintance who wishes to avail IT services?

Any other feedback / recommendation that you may like to mention:

Inclusion of Projects in Pune and Vadodara and T&M projects in GAVS - CSS questionnaire

T&M: GAVS provides talents/people to Customers and owns project execution, governance and delivery.

1. Knowledge/Understanding of Customer Business requirements
2. Meeting agreed deadlines / SLA for deliverables / services

3.Demonstrating expertise in required technical area

4.Team participation in solving issues / problems in an expected timeline

5.Overall quality of deliverables / services

How likely is that you would recommend GAVS to your friend / acquaintance who wishes to avail IT services?

Any other feedback / recommendation that you may like to mention:

Staff Augmentation - CSS Questionnaire:

Staff Augmentation - GAVS provides talents/people to customers. Customers take care of project execution,governance and delivery.

1.Competency of People/talents provided

2.Onboarding People/talents as per expected timeline

3.Overall quality of engagement and services from GAVS

How likely is that you would recommend GAVS to your friend / acquaintance who wishes to avail IT services?

Any other feedback / recommendation that you may like to mention:

