

The background features a light gray grid pattern overlaid with various colorful circular and semi-circular shapes. Some shapes are solid colors, while others are outlines or contain numbers like '01', '02', and '03'. A central gear icon is also visible.

Visualizing Customer Success

- Measure how our customers value Autodesk products

Ruimin (Raven) Gao

Data Visualization Engineer

ADP-Product Intelligence (Manager: Jane You)

Purdue University, Computer Graphics Technology (Graduation date: Dec-2017)

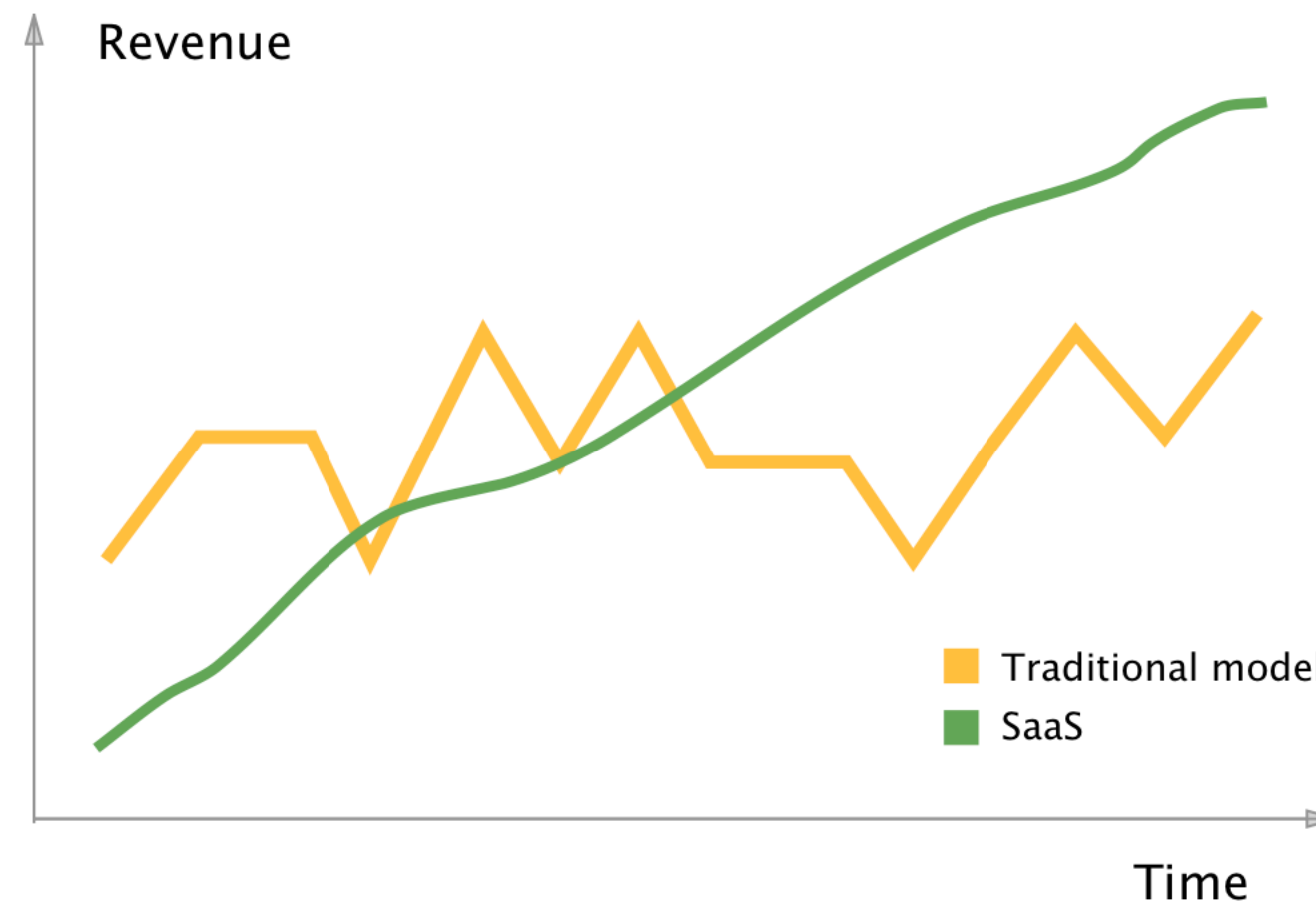
A visualization Practice for Uniform Customer Success Metrics



A visualization Practice for Uniform Customer Success Metrics



Customer Success is that customers realize the value they expect through interactions with product.



Customer Success
||
Building Relationship

But.....

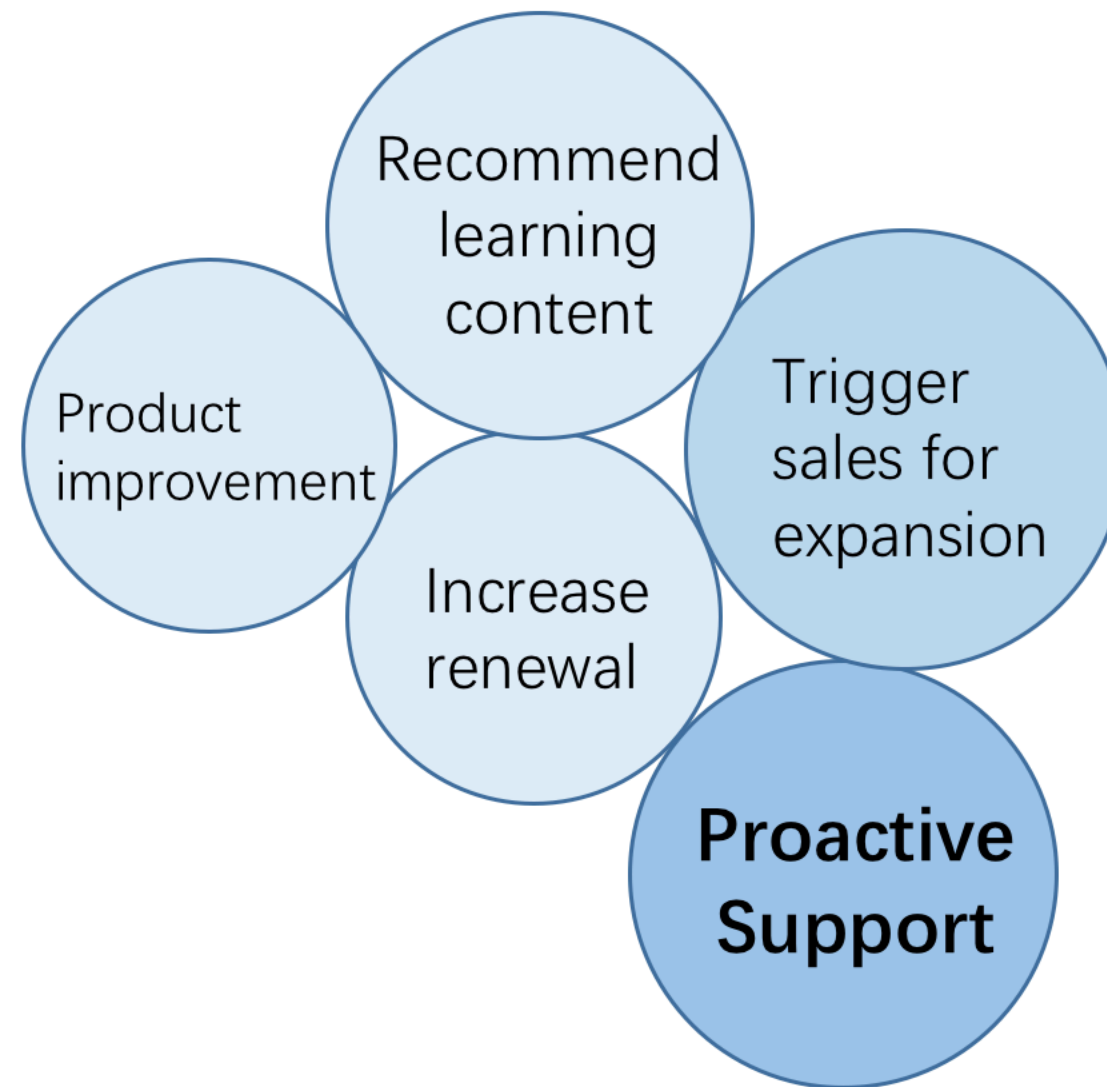
How to measure the success?

How to achieve customer success?

A visualization Practice for Uniform Customer Success Metrics

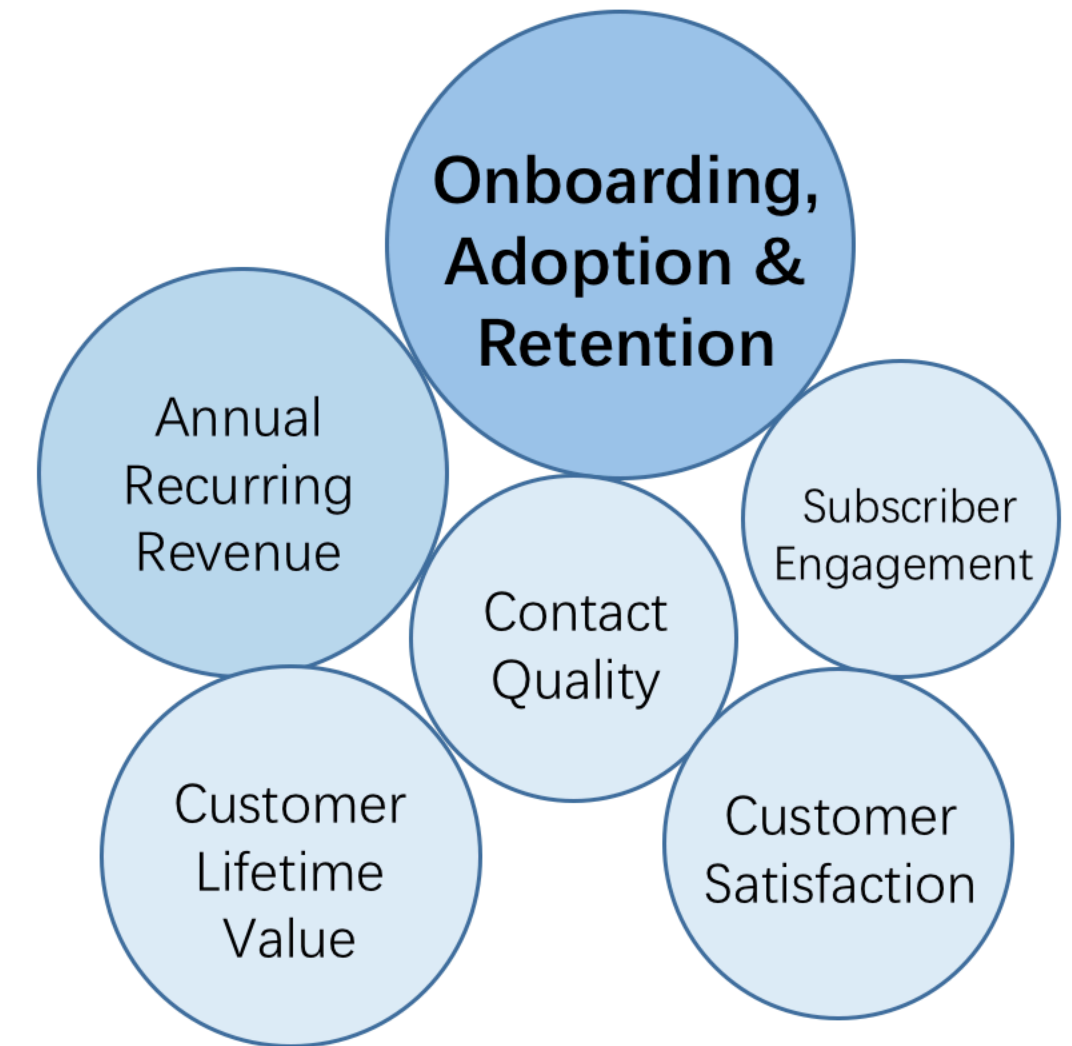


To achieve Success:



Monitor and navigate during customer lifecycle

To measure Success:



Create standardized metrics of Customer Success

A visualization Practice for Uniform Customer Success Metrics

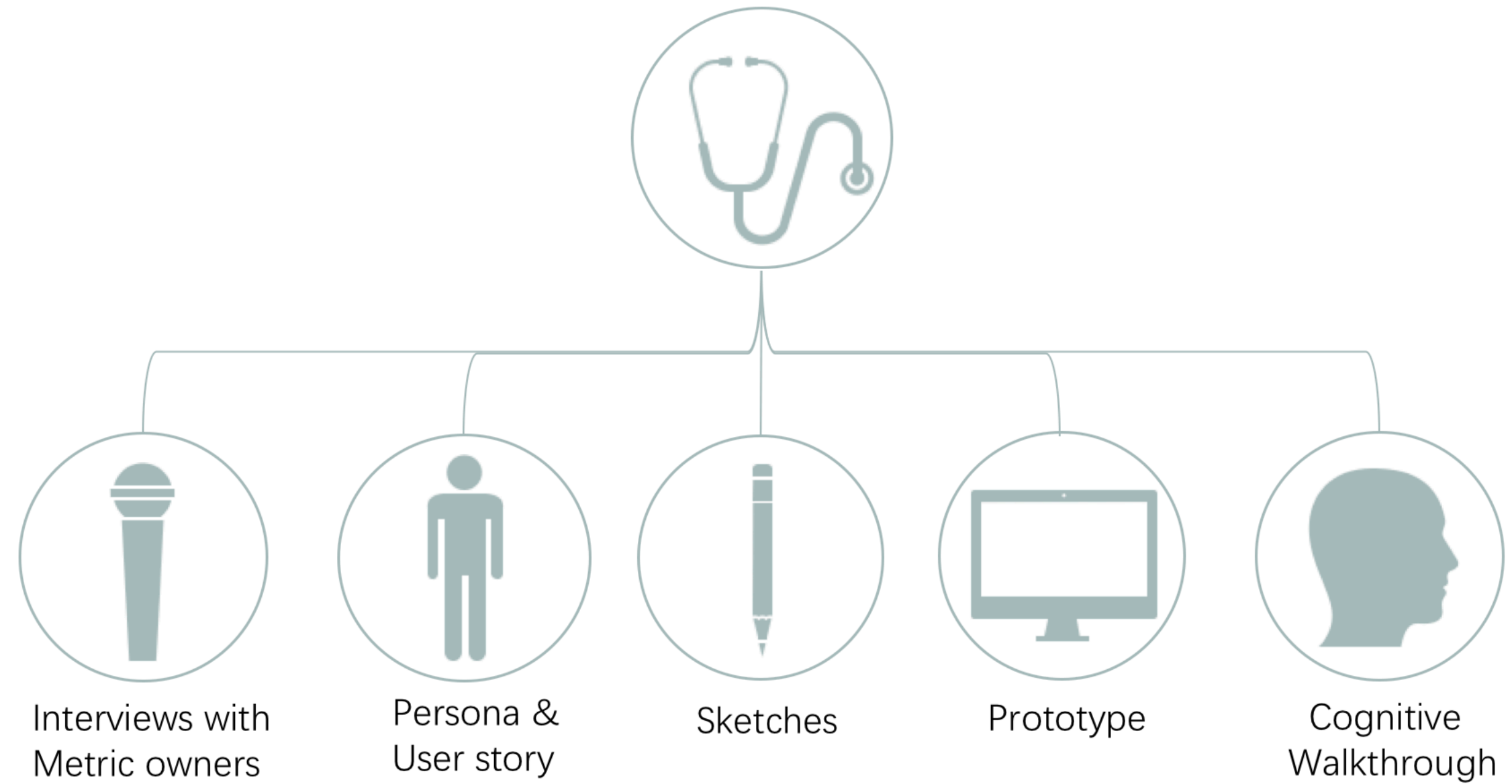


We need to **SHOW** success. a tool of --

VISUALIZATION

Not only to present data,
but also to assist analysis.

A visualization Practice for Uniform Customer Success Metrics



PROJECT PLANNING

Use this when you're beginning a new project and you want to get started with a clear head.

1 Start planning

Start by filling in each of the sections below to get your project off to a solid start. Invite other planners or stakeholders to collaborate as you define the different pieces of your project. Some **PRO TIPS** are listed at the bottom of some of the sections.

PROJECT GOALS

What problem are we trying to solve?

Create Dashboard for executives

Assist in Data-driven company culture

Innovate & creative

Trigger people's curiosity & attention

Deliver insights

PRO TIP: You can also use this space to add in positive examples of similar projects for inspiration.

HOW WILL WE MEASURE SUCCESS?

Be specific. Example: "Increase one-day retention by 15%" instead of "Better retention"

Fulfill user expectation through iteration

Provide deeper insights

Measurement: Usability test

WHO WILL PARTICIPATE?

What will their roles be?

Raven	Data Visualization Engineer	Design metrics and dashboard through iteration
Guanqiao Yin	UX designer	Assist in designing / evaluation process
DE of PI team	Data Engineer	Assist in creating data model and Process data

PRO TIP: Once you get your project going, you can use the Project Kickoff template to get your team on the same page.

COST

Time, resources, budget, etc.

(If interaction involved)

Touch-screen

Voice-input device....etc

WHAT ARE WE MISSING?

What necessary ingredients for your project do you still need?

Primary user research

Deep User requirement analysis

Metric selection and evaluation

Future usability test

WHAT DO WE HAVE?

What necessary ingredients for your project do you already have?

Secondary research

Front-end: d3.js, Highcharts, Angular 2.0

Backend: Node.js, python(flask), PHP

POTENTIAL OBSTACLES

Know what road blocks you might run in to so you can be prepared for them.

Data available ≠ Metrics selected

User requirements change through iterations

Many iterations before deployment

Interaction can be limited (hardware, user research)

Complex visual presentation might be restricted

Visualization does not fulfill user expectation

ACTION ITEMS

What are our next steps?
Who is responsible for doing them?

Data Visualization Engineer	Conduct secondary research	Design metrics/charts through iterations
	Iterate and evolve prototypes	Develop final version of dashboard
UX designer	(assist) Evaluate prototypes through iterations	(assist) design usability test
Data Engineer	(assist) create data model & workflow	

PROJECT TIMELINE

PRO TIP: You can delete this timeline and use the monthly calendars in the Frameworks section to plan with specific dates and deadlines.

Plan project

Organize project goals and define what needs to get done.

Understand User requirement

Generate initial metrics

Design prototype

Iterate and Evolve

Deployment

WHY, HOW & WHAT

User research

Secondary research on key factors executives care about

Interview & survey

Factors based on user research

visual design

Data source: ADP data, company network, social media

dashboard structure

Each Metric presentation

Interaction Pattern

Visual presentation

Metrics (data)

Interaction

User requirement adjustment

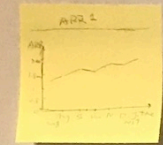
Build data model

Build framework for dashboard

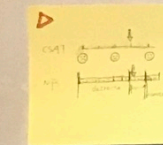
create final visualization charts

Uniformed Customer Success Metrics

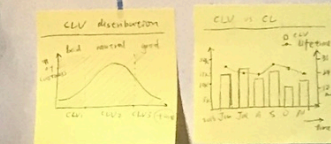
① ARR



② NPS/CSAT

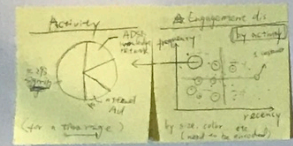


③ Expected CLV/CAC

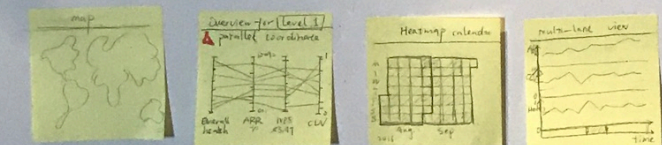


④ Overall Health Score

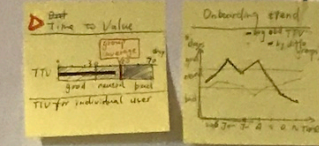
- Subscriber Engagement



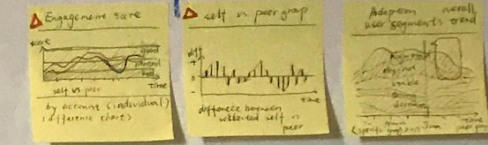
△ Framework, Side design



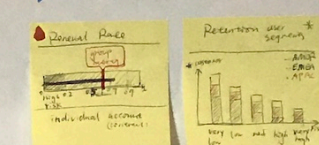
- Onboarding



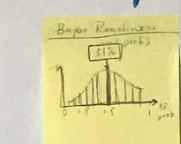
- Adoption



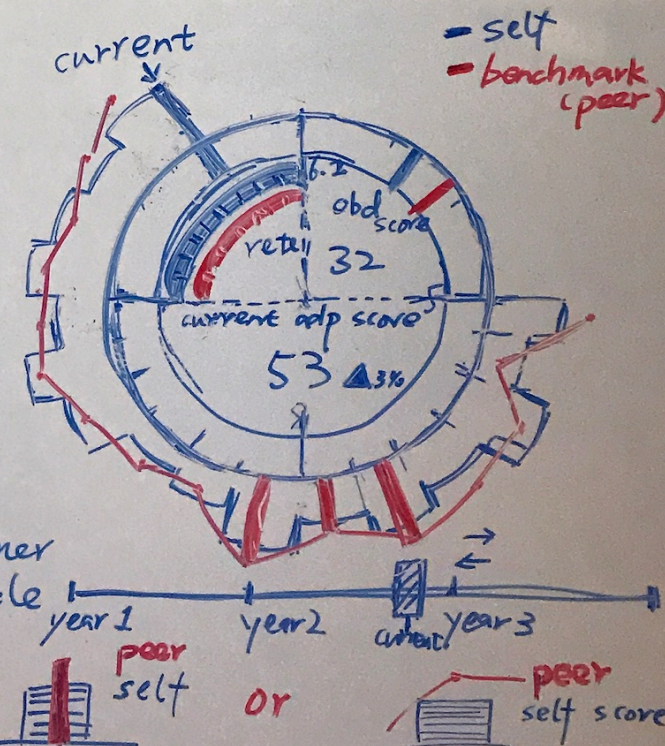
- Retention



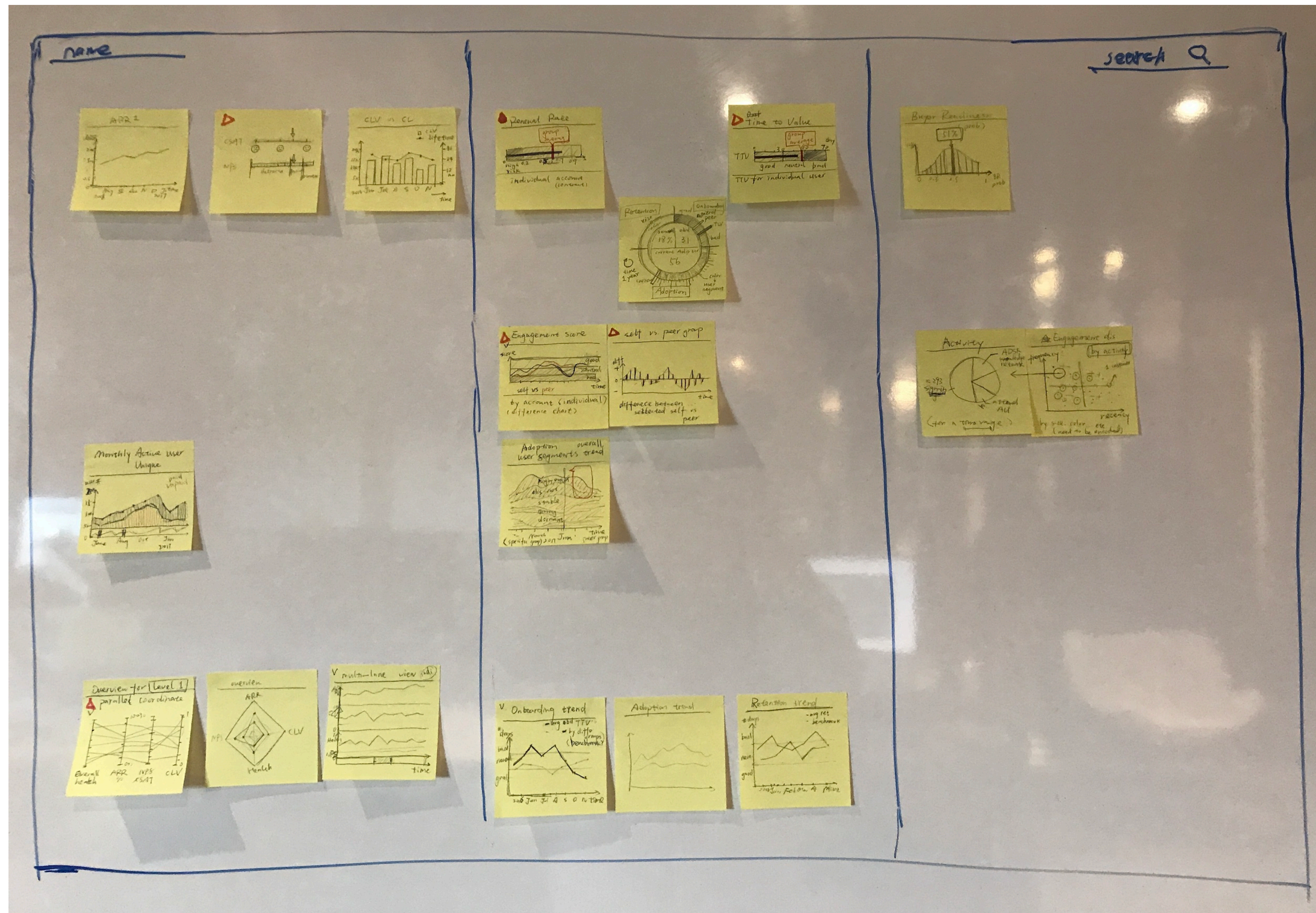
- Buyer Readiness



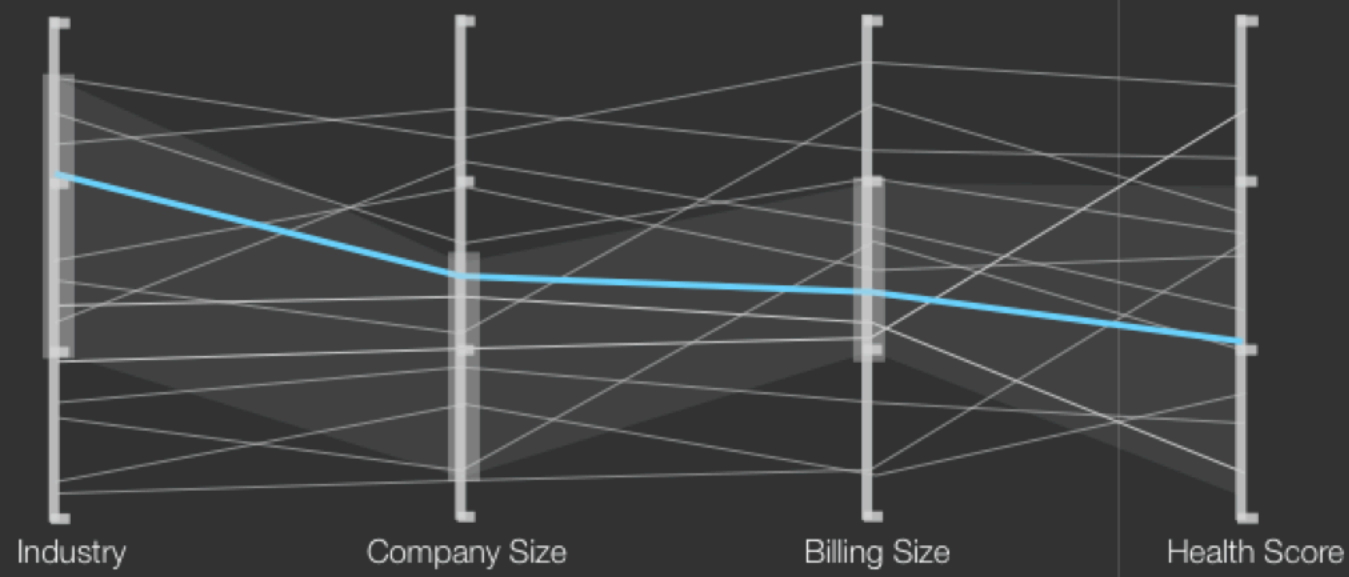
- Contact Quality Score



Initial layout design for 2nd visualization view

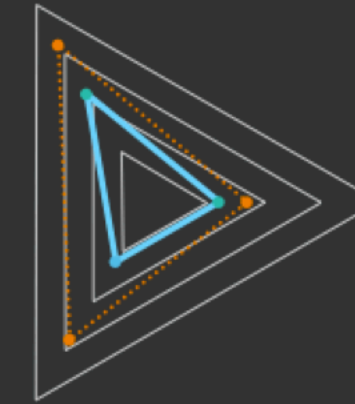


CUSTOMER COMPANY: BOSCH



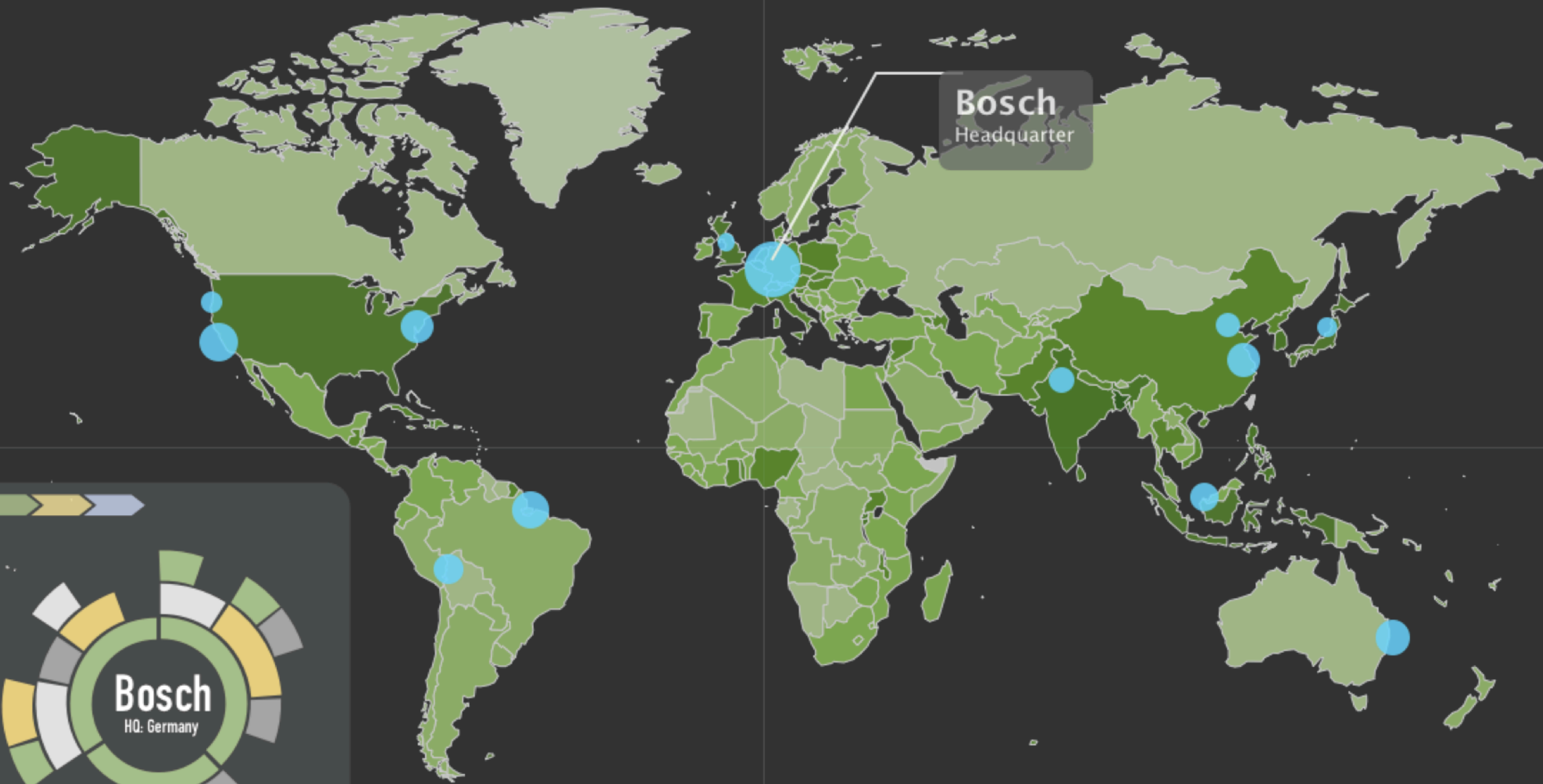
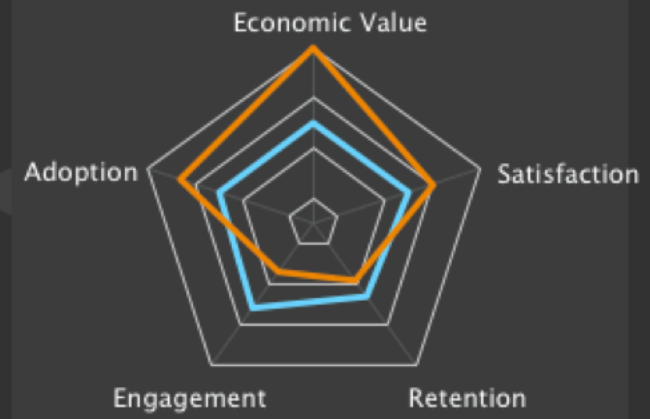
- COMPANY A
- COMPANY B
- Bosch**
- COMPANY D
- COMPANY E
- COMPANY F
- NBBJ
- COMPANY H

ARR MoM

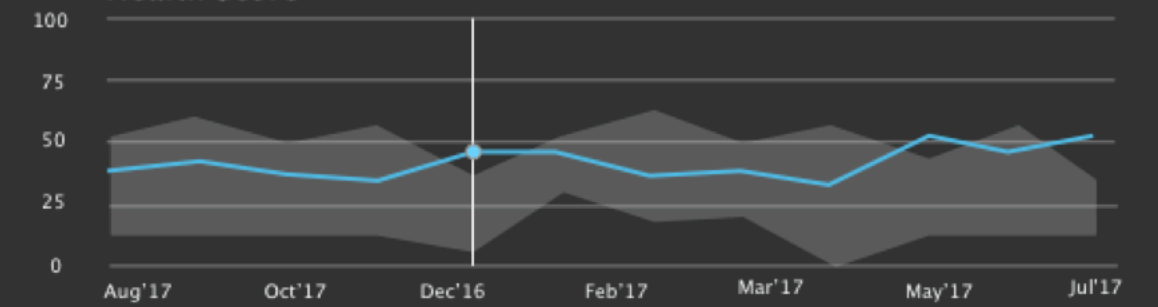


Expected CLV

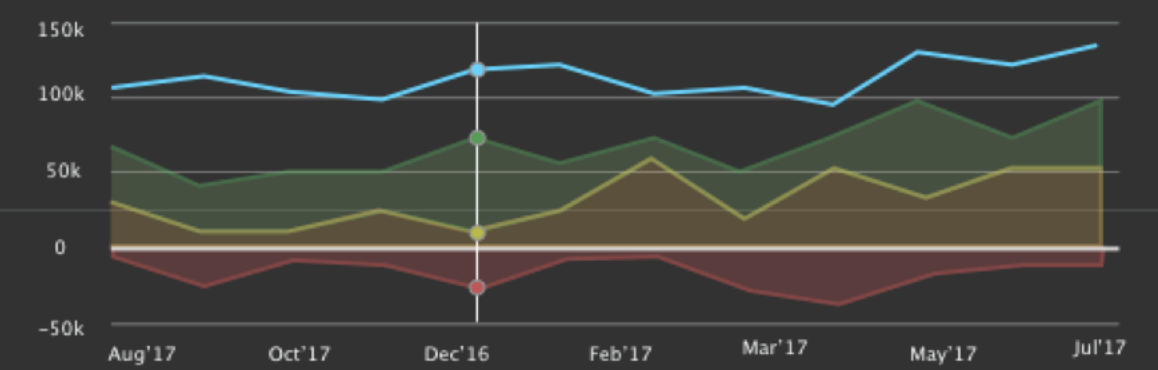
Health Drivers



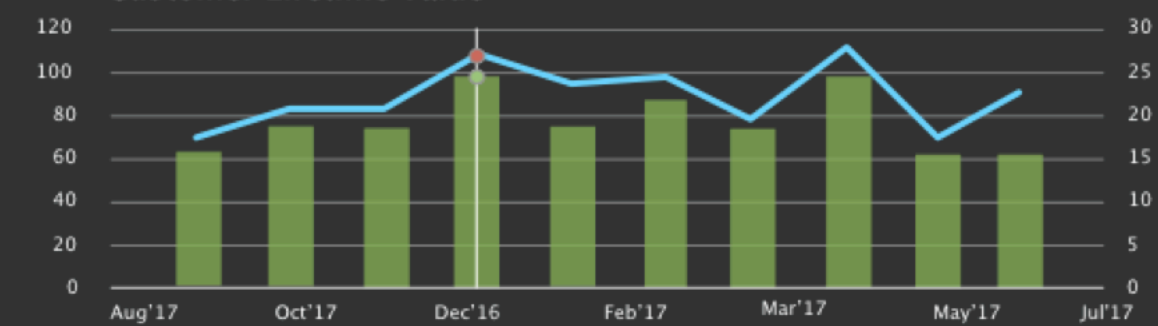
Health Score

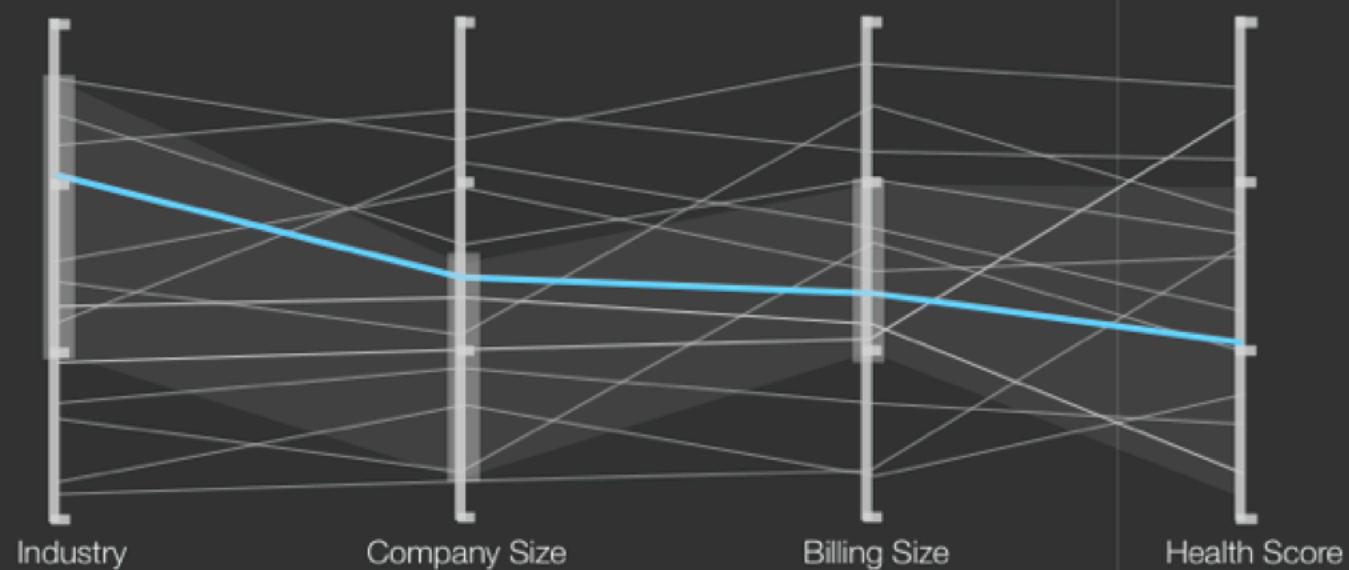


ARR Growth



Customer Lifetime Value

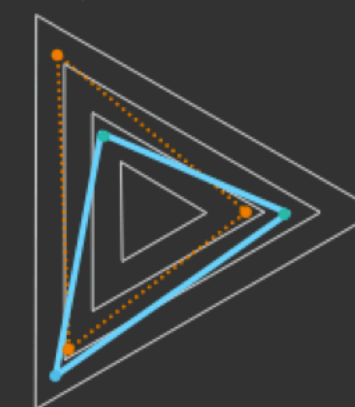




CUSTOMER COMPANY: NBBJ

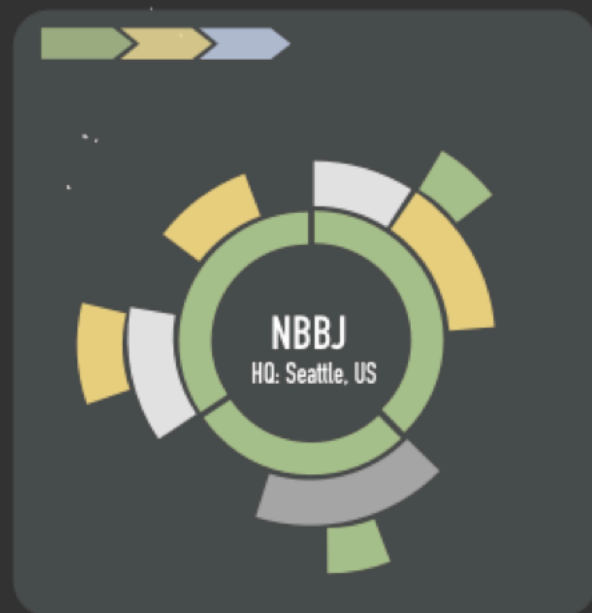
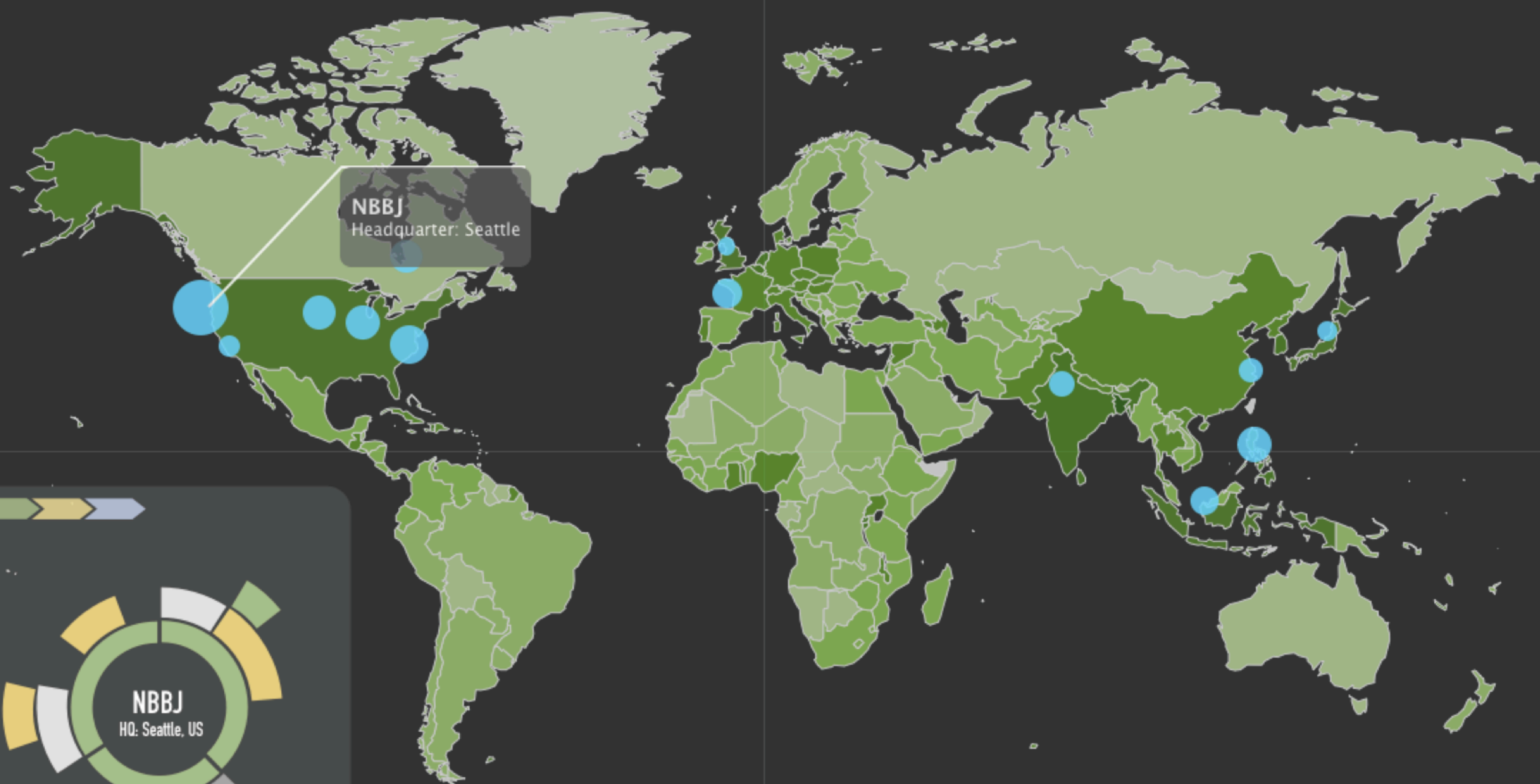
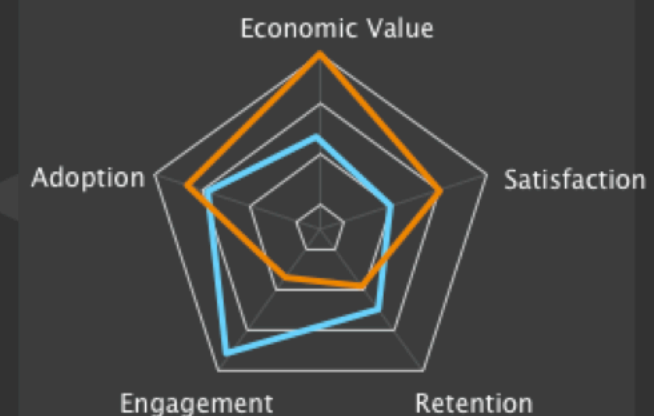
- COMPANY A
- COMPANY B
- Bosch
- COMPANY D
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ARR MoM

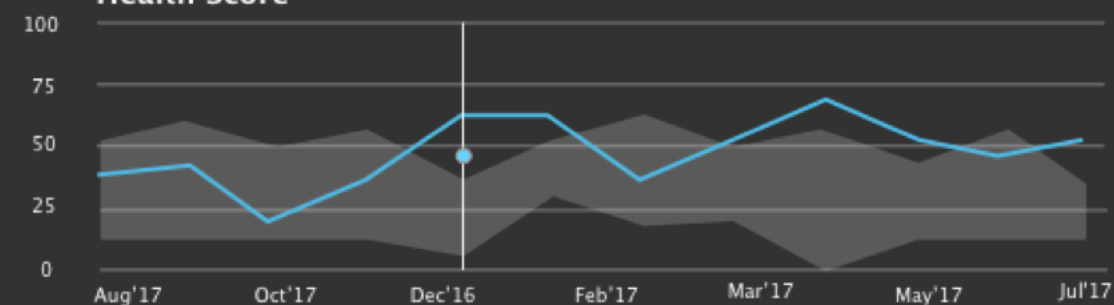


Expected CLV

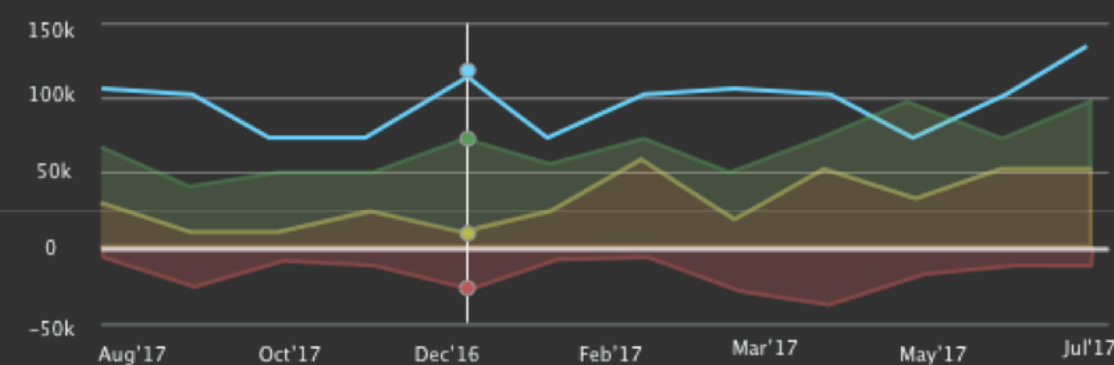
Health Drivers



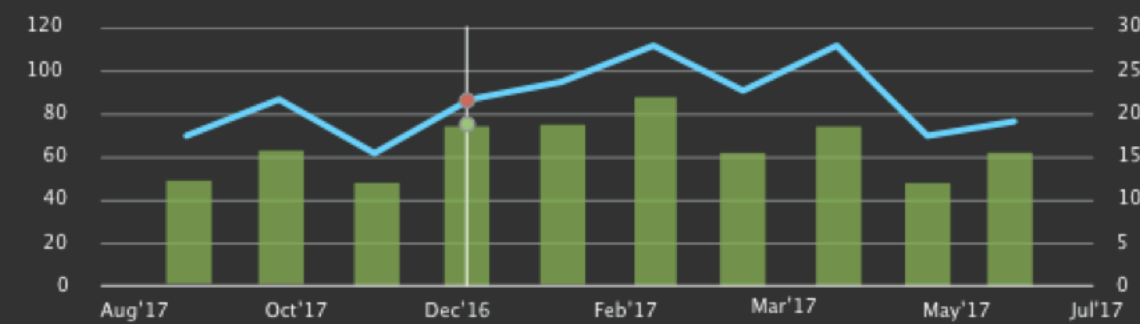
Health Score



ARR Growth



Customer Lifetime Value



“We want to understand customers across categories such as industries, company size, billing size, etc.

CUSTOMER COMPANY: NBBJ

- COMPANY A
- COMPANY B
- COMPANY D
- COMPANY E
- COMPANY F
- NBBJ
- COMPANY H

Industry Company Size Billing Size Health Score

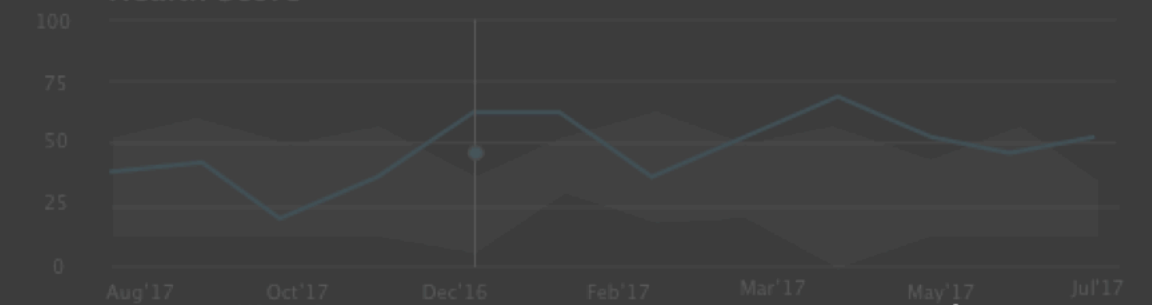


“We want to see the growth for each customer across regions. Even the hierarchies and distribution of the customer.”

NBBJ
Headquarter: Seattle

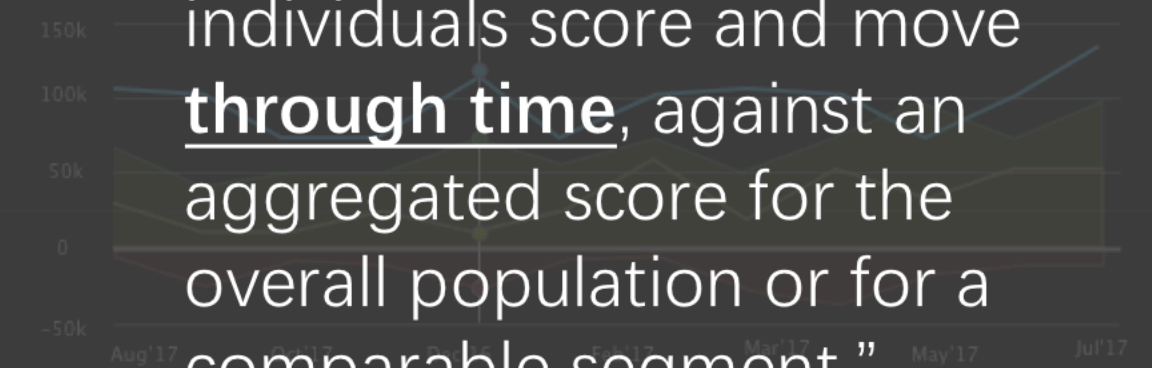


Health Score

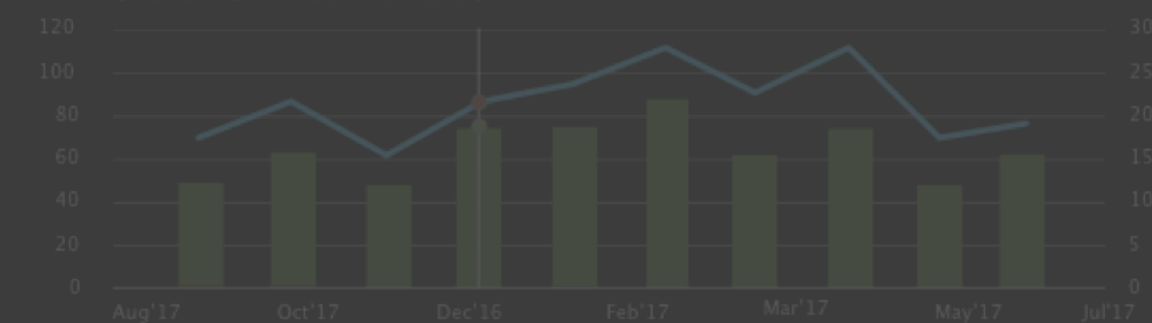


“We want to compare the individuals score and move through time, against an aggregated score for the overall population or for a comparable segment.”

ARR Growth



Customer Lifetime Value

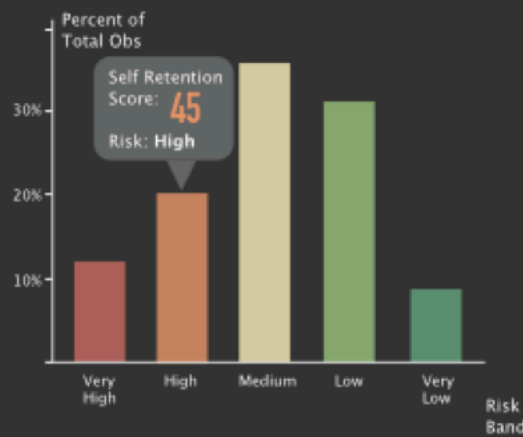


Retention

What impacts Retention Score?

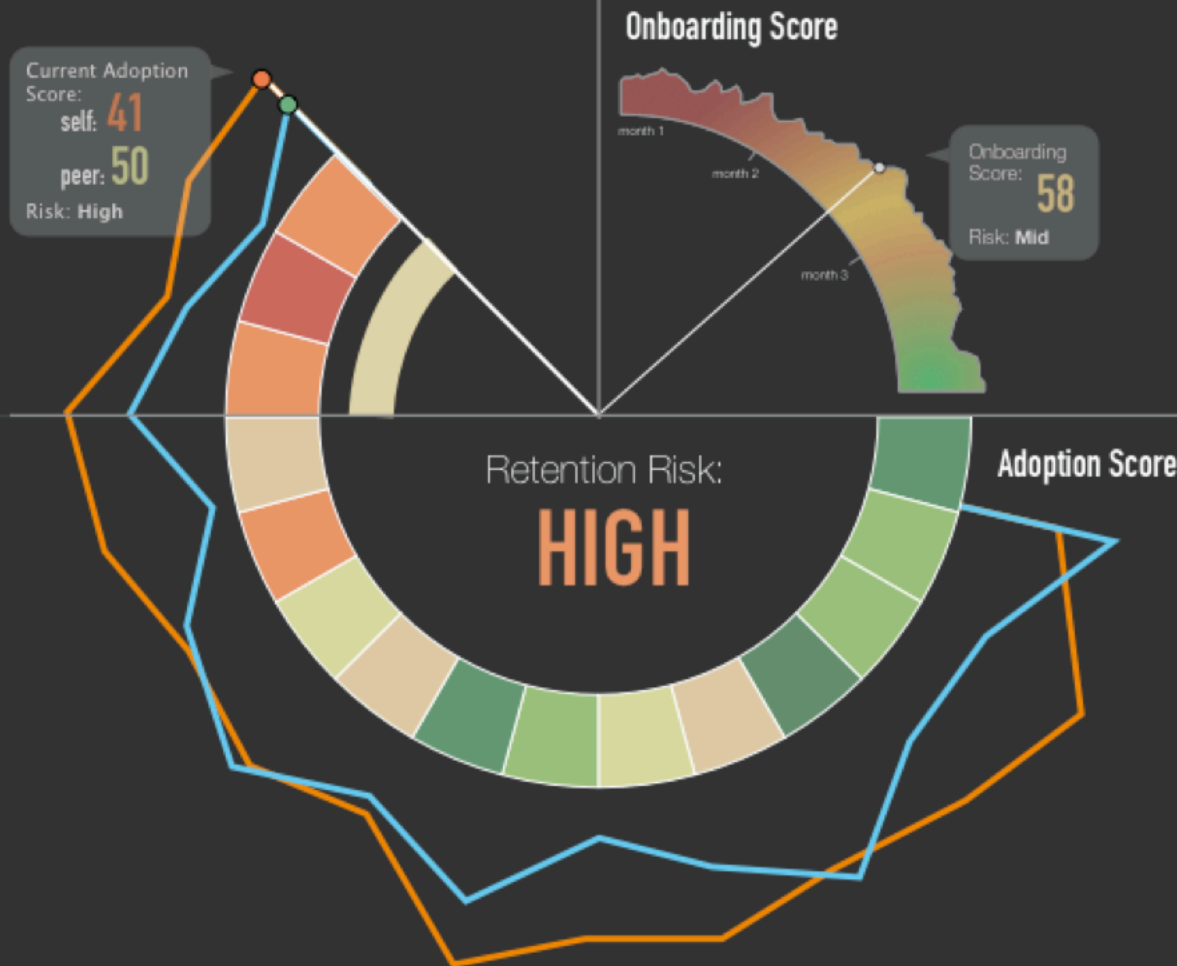


Worldwide Predicted Retention



Customer Lifecycle: Bosch

Level: Contract 2 | Subscriber All

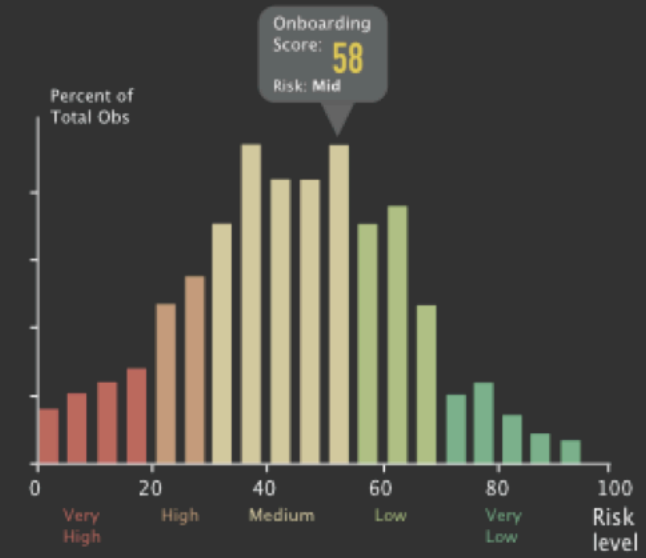


Onboarding

What impacts Onboarding Score?

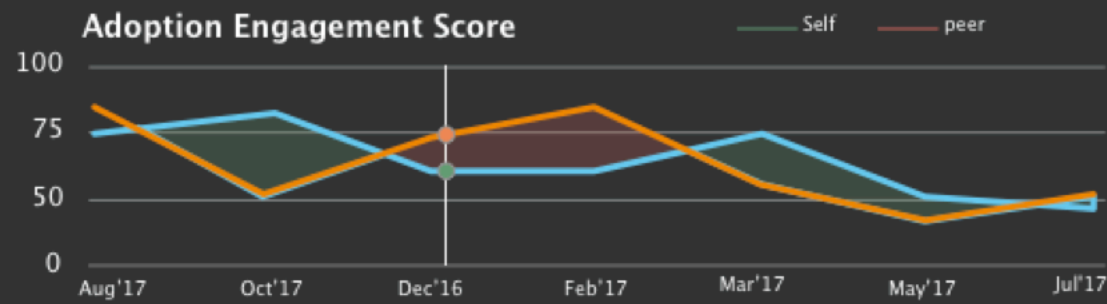


Onboarding Risk distribution

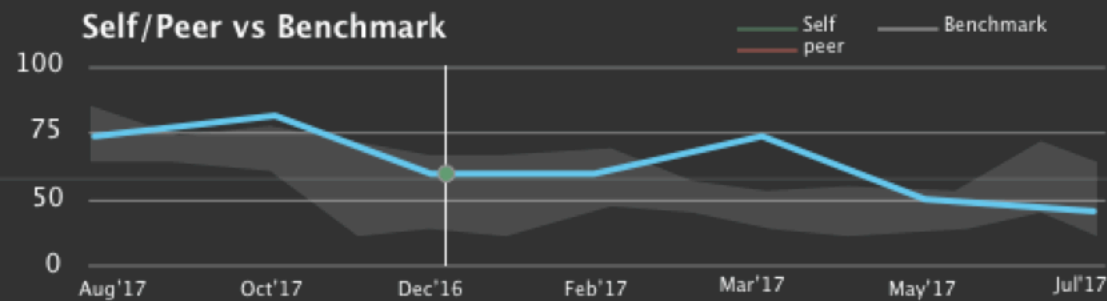


Adoption

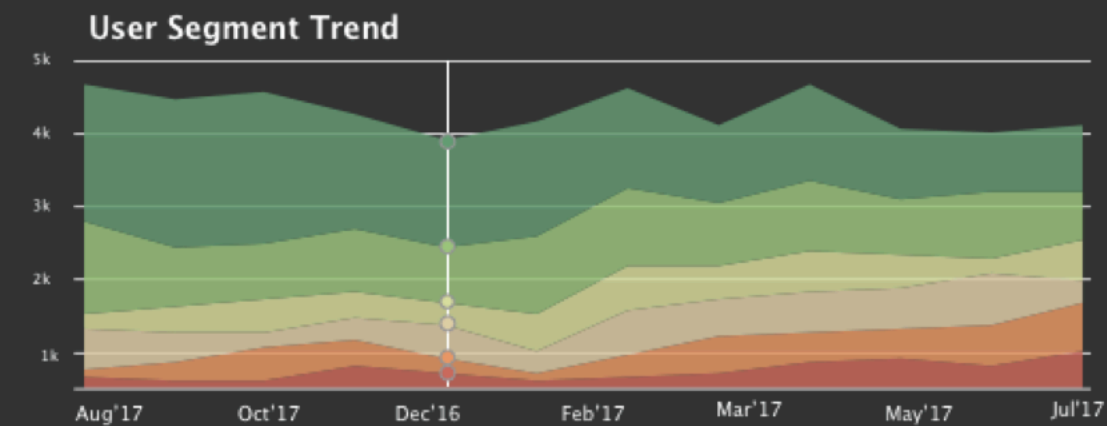
Adoption Engagement Score



Self/Peer vs Benchmark



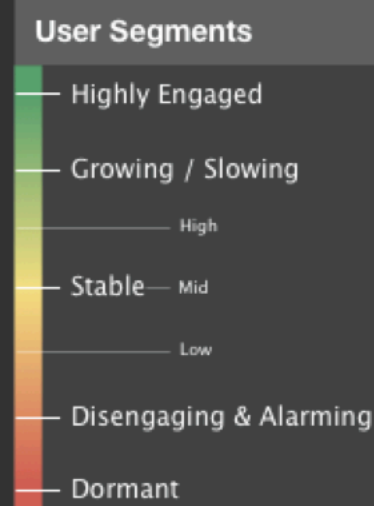
User Segment Trend



Satisfaction

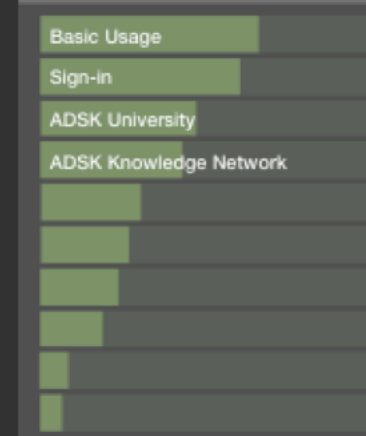


How are User Categorized?

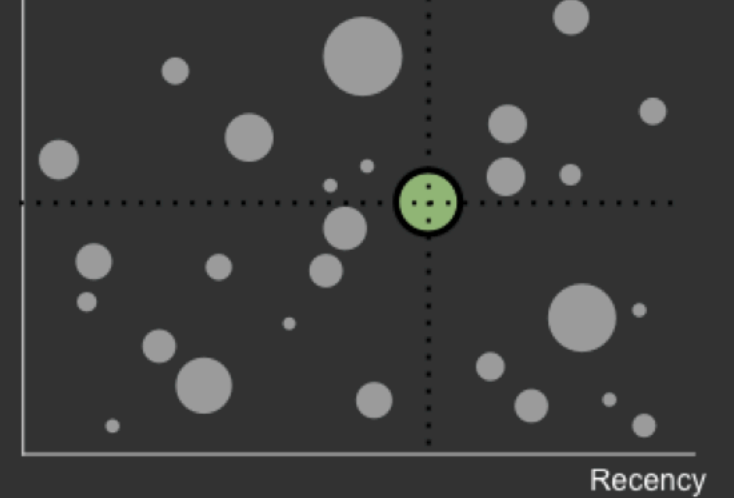


Engagement

Activity List



Frequency



Economic Value

Contract Value

\$498k ▲ 2.1%

Customer Lifetime Value

\$9.5M ▼ 3.6%

Account Buyer Readiness

53% ▲ 2.1%

Annual Recurring Revenue

\$1.5M ▼ 1.1%

Retention

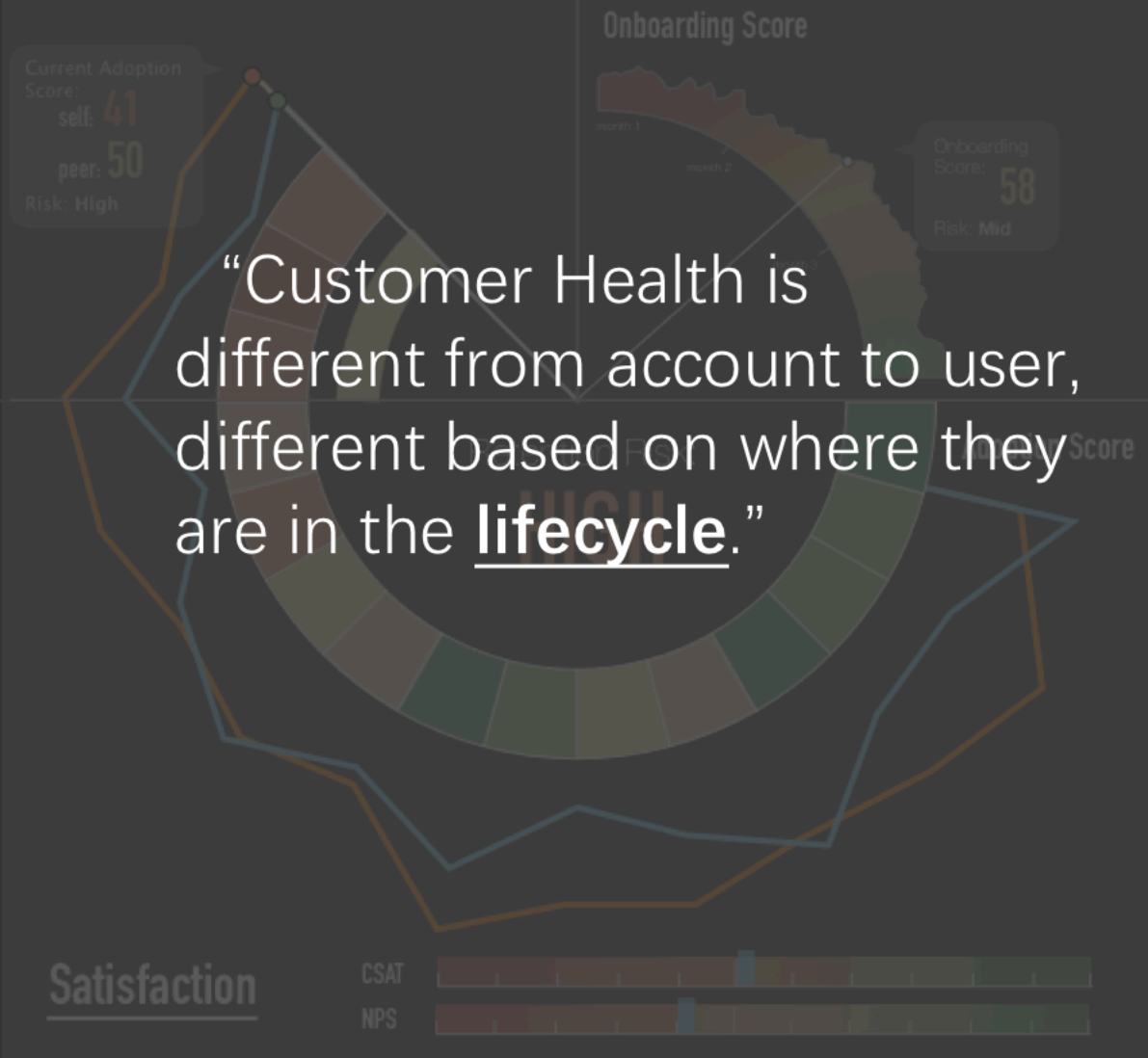
Worldwide Predicted Retention

What impacts Retention Score?



Customer Lifecycle: Bosch

Level: Contract 2 Subscriber All



Onboarding

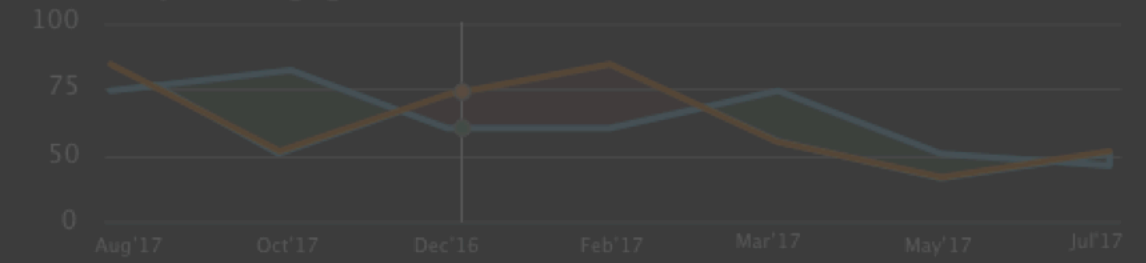
Onboarding Risk distribution

What impacts Onboarding Score?

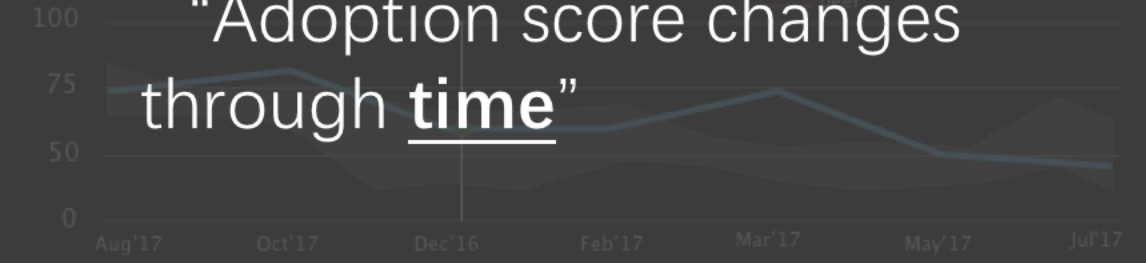


Adoption

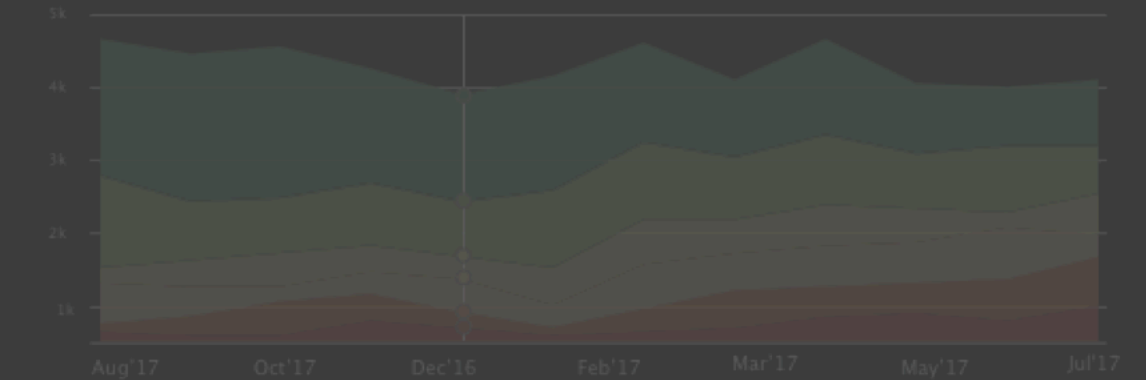
Adoption Engagement Score



Self/Peer vs Benchmark



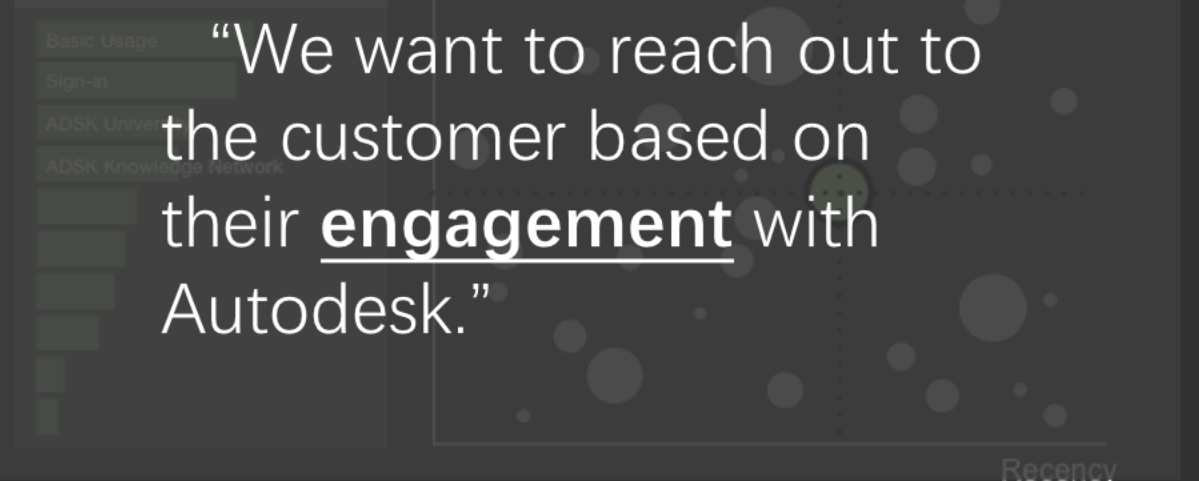
User Segment Trend



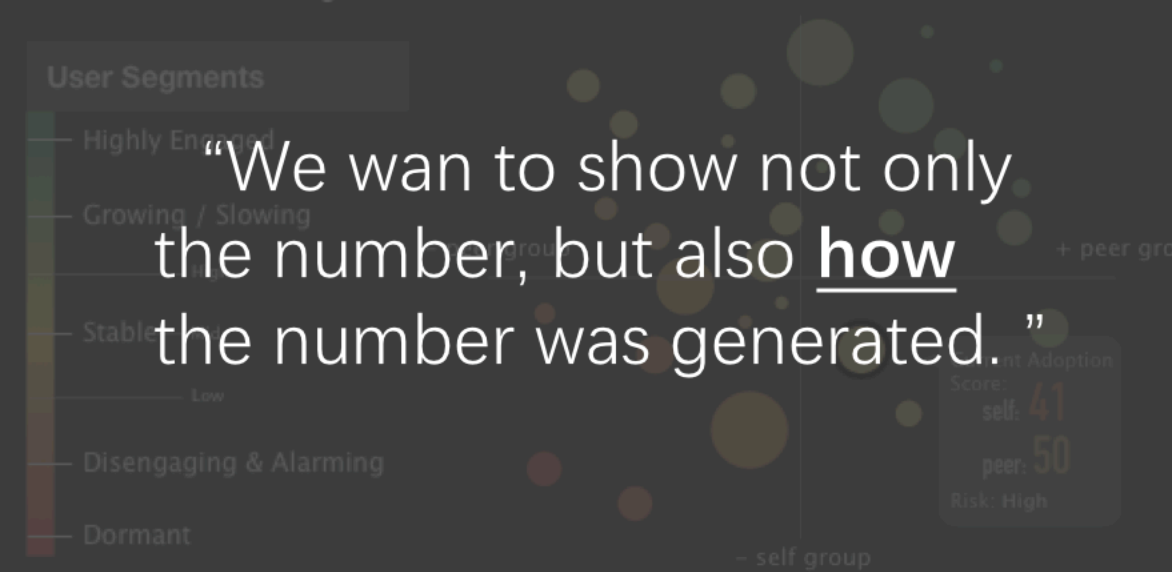
Engagement

Activity List

Frequency



How are User Categorized?



Economic Value

Contract Value

Customer Lifetime Value

