Global Survey Report 2022

Customer Success Intelligence & Automation

PUBLISHED BY smartkarrot

Looking toward the future of CS

Strong Customer Success teams are undeniably powerful. From onboarding to retention and advocacy, they work tirelessly to improve every stage of the customer journey.

We believe in harnessing that power and providing CS Teams with the tools they need to create better outcomes for their customers and companies.

Customer Success teams around the world are utilizing technology, specifically intelligence and automation, to improve consistency in their processes, monitor their customer's experience, and scale their operations quickly. How do we know this? They told us!

Prithwi Dasgupta
Founder & CEO, SmartKarrot

Moving toward Optimism

SmartKarrot's annual Global Customer Success Survey provides a forecast for trends shaping the Customer Success industry.

Intelligence and automation are becoming more prevalent across the industry in 2022, regardless of the size or location of the CS Team. In the wake of the COVID-19 pandemic, practitioners and executives are starting to shift their focus to sustainable growth. CS Teams seem optimistic about the future of Customer Success, and we don't blame them!

Technology changes fast and so do the needs of a customer. Using your feedback, we're building smarter tools that help you (and your customers) succeed.

3

700 Participants.
41 Countries.

North America
63%

South America
5%

Europe
12%

Asia
12%

Africa
5%

Australia
3%
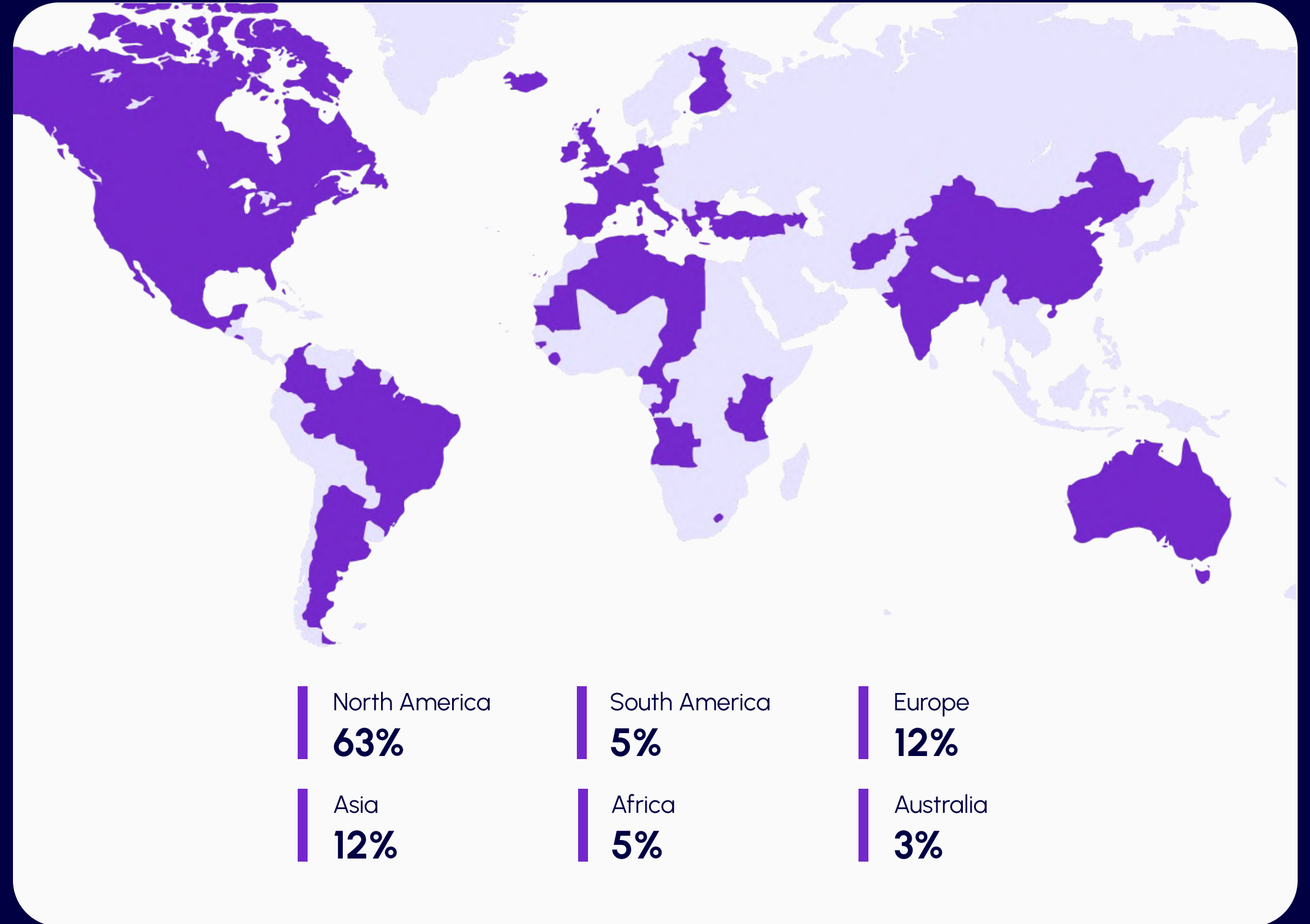
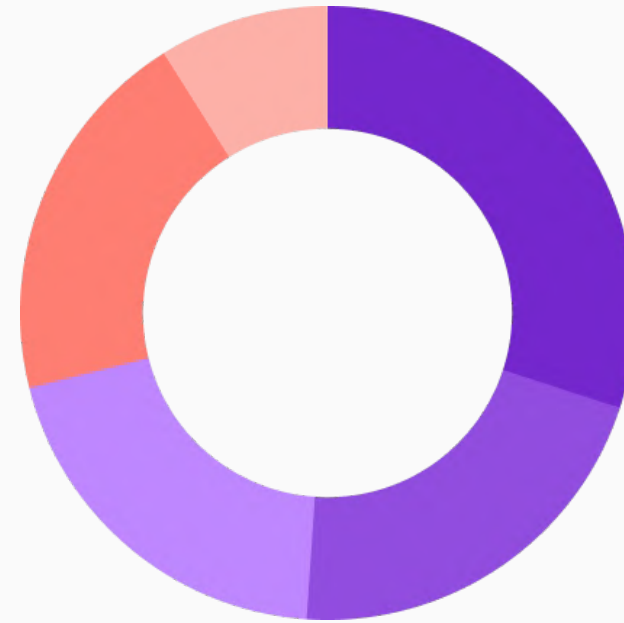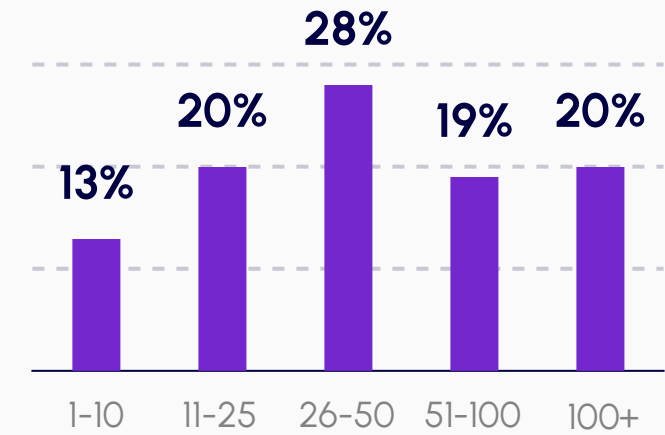# 700 Participants.
41 Countries.

Participants by Role
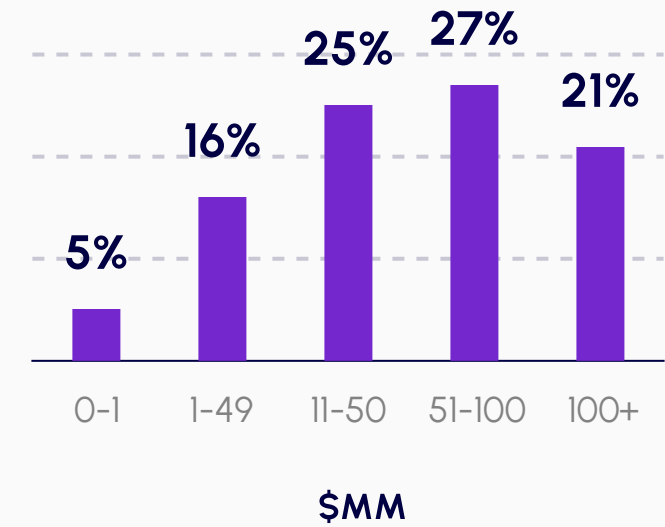
- CS Manager **30%**
- CS Team Member **21%**
- CS Leader **20%**
- CEO **20%**
- Stakeholder **9%**

Participants by Team Size

28% 26-50
20% 11-25
19% 51-100
20% 100+
13% 1-10

1-10   11-25   26-50   51-100   100+

Participants by ARR

5% 0-1
16% 1-49
25% 11-50
27% 51-100
21% 100+

0-1   1-49   11-50   51-100   100+

$MM

Operations & Technology
Tech-based CS solutions.

Customer Success Teams tend to be interested in expanding or improving their toolkit with new technology and features. However, they are facing some challenges with the implementation.

Read More

Intelligence
Working smarter, not harder.

Without customer data, there would be no customer success. Raw data, however, is of little value to CS Teams. Globally, CS Teams of all sizes need and want intelligent data and insights.

Read More

Automation
Driving efficiency at scale.

Worldwide, CS Teams have seen the value in Automation but are struggling to utilize it at scale. Many businesses are interested in introducing automation to specific CS processes.

Read More

The Future of CS
2023 and beyond.

Across industries, not only SaaS, but Customer Success is also rapidly advancing in the direction of improved technology (intelligence and automation).

Read More

Operations & Technology

Tech-based solutions for CS problems.

We know CS Teams are using technology to improve their day-to-day life. Customer-centric organizations know that improving operations can result in happier teams and customers.

———

In this section, see which solutions the industry is prioritizing and get insights into common challenges faced by CS Teams.
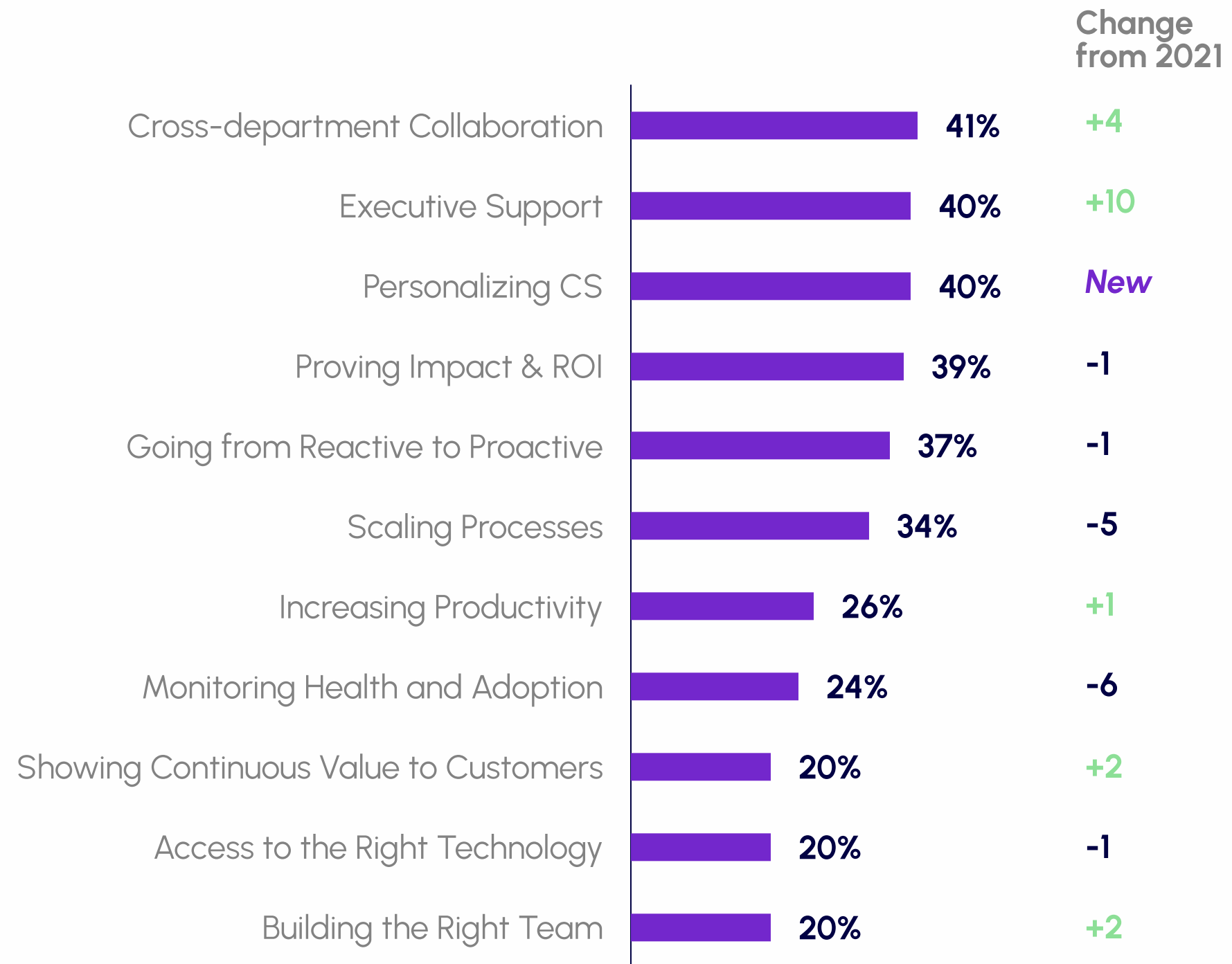
What **challenges** does your CS Team currently face?

41% say cross-department collaboration is the biggest challenge their CS Team is currently facing.

THE SMART TAKE

Overall, the biggest CS challenges in 2022 are Cross-department collaboration (41%), Executive support (40%), and Personalizing CX (40%).

Garnering Executive support and Cross-department collaboration are bigger challenges now compared to last year.

Change from 2021

Challenge	%	Change from 2021
Cross-department Collaboration	41%	+4
Executive Support	40%	+10
Personalizing CS	40%	New
Proving Impact & ROI	39%	-1
Going from Reactive to Proactive	37%	-1
Scaling Processes	34%	-5
Increasing Productivity	26%	+1
Monitoring Health and Adoption	24%	-6
Showing Continuous Value to Customers	20%	+2
Access to the Right Technology	20%	-1
Building the Right Team	20%	+2

What **challenges** does your CS Team currently face?

41% say cross-department collaboration is the biggest challenge their CS Team is currently facing.
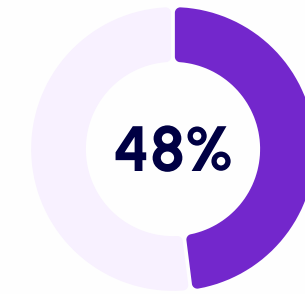
THE SMART TAKE

Overall, the biggest CS challenges in 2022 are Cross-department collaboration (41%), Executive support (40%), and Personalizing CX (40%).
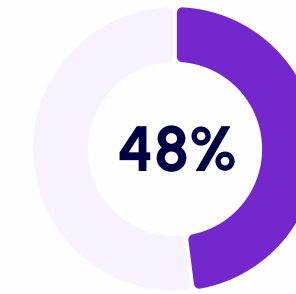
Garnering Executive support and Cross-department collaboration are bigger challenges now compared to last year.
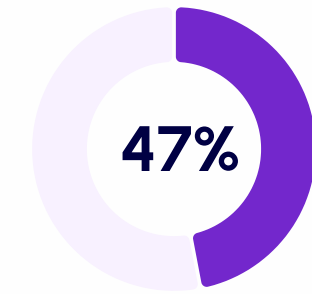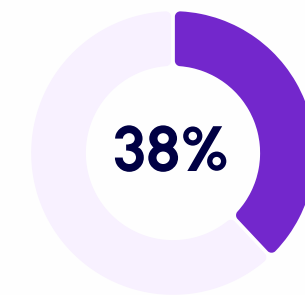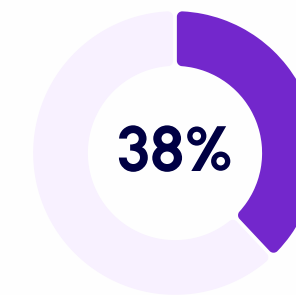
Large
100+

48%
Executive Support

48%
Proving Impact & ROI

47%
Cross-dept. Collab

Medium
26 – 99

38%
Personalizing CS

38%
Cross-dept. Collab
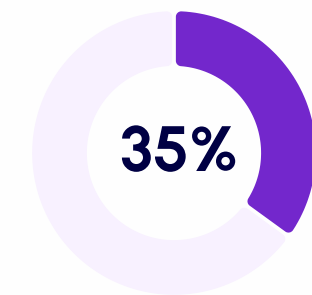
35%
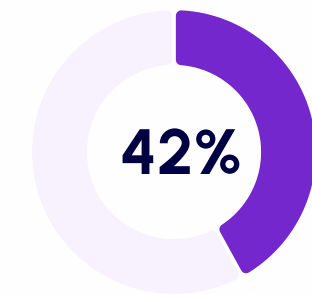Executive Support

Small
1-25

50%
Reactive to Proactive

44%
Proving Impact & ROI
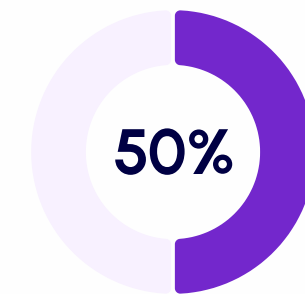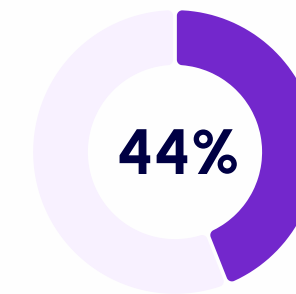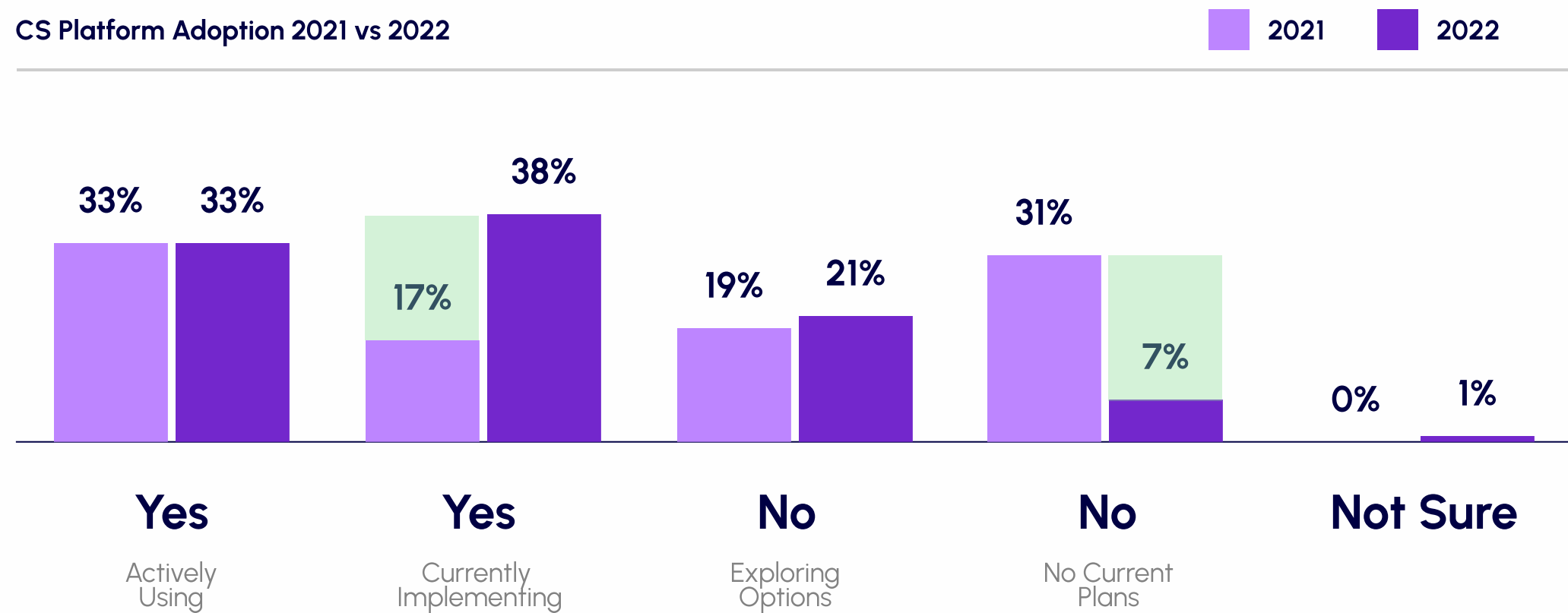
42%
Monitoring Health / Adoption

Does your organization use a **dedicated** customer success platform?

71% of organizations are either **actively using or implementing** a dedicated customer success platform.

THE SMART TAKE

Compared to 2021, there is a significant increase in companies **currently implementing CS platforms (17% vs. 38%)** and a substantial drop in companies with **no plans** of using one **(31% vs. 7%)** — both pointing in the direction of rapidly growing adoption of dedicated technology in Customer Success.

CS Platform Adoption 2021 vs 2022

2021   2022

| | 33% | 33% | 17% | 38% | 19% | 21% | 31% | 7% | 0% | 1% |

Yes — Actively Using

Yes — Currently Implementing

No — Exploring Options

No — No Current Plans

Not Sure

CS Platform Adoption by Company Size

Large	73%
Medium	77%
Small	40%
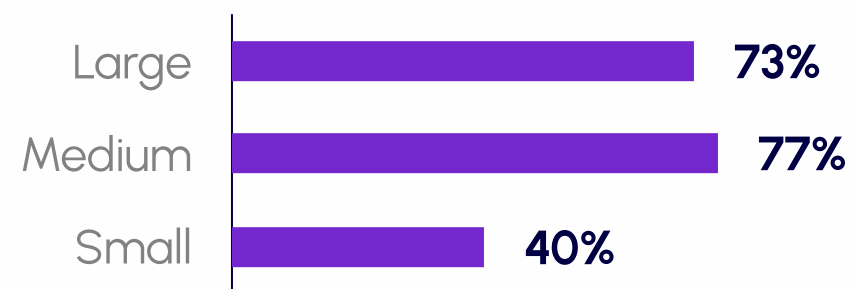
CS Platform Adoption by Region

US	77%
APAC	59%
Europe	66%

Which of the following **popular features** of a customer success platform are most important to you and your team?

51% consider surveys and campaigns to be the most important feature in a CS Platform

THE SMART TAKE

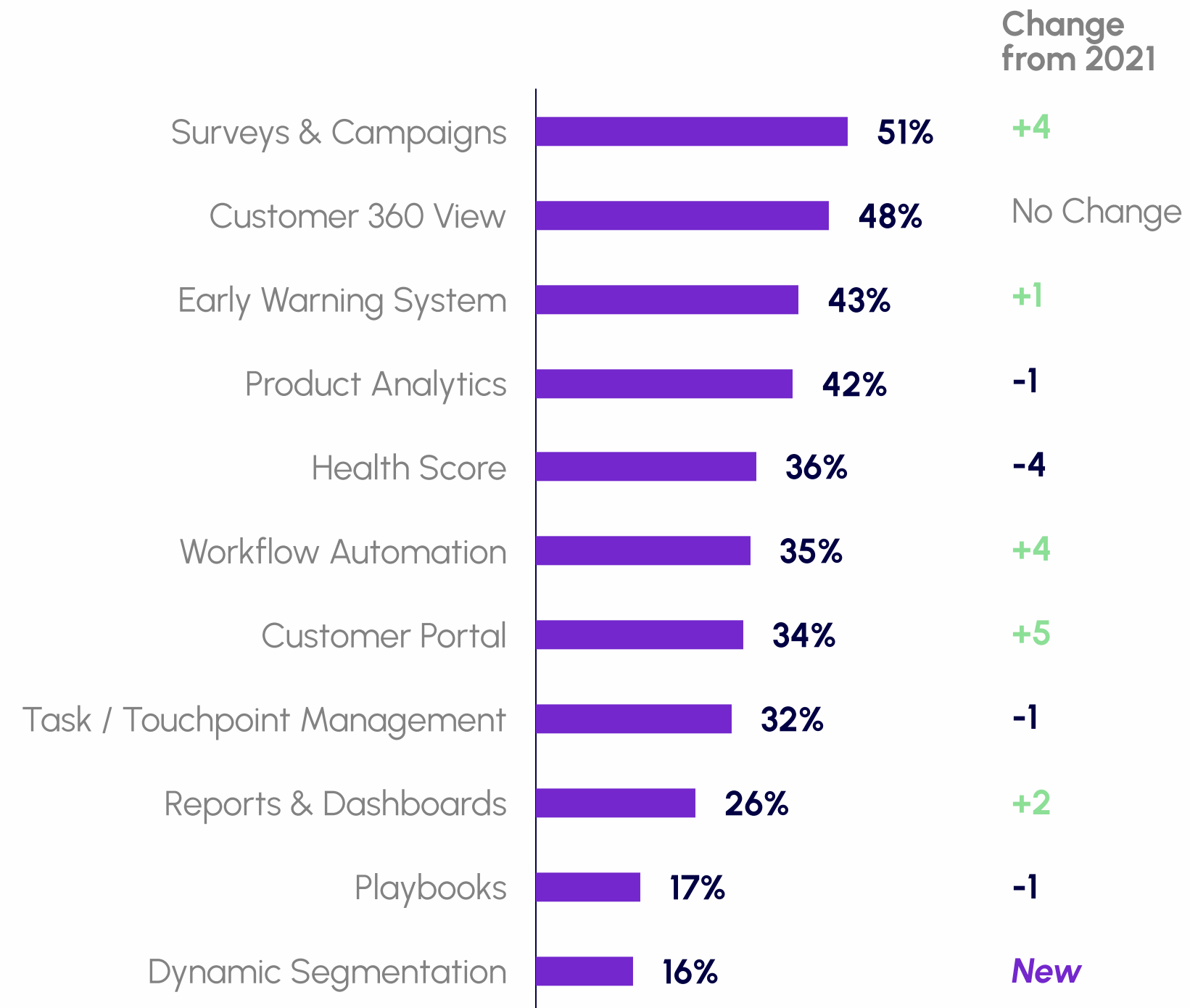Compared to 2021, surveys and campaigns, workflow automation, and customer portals have seen the largest increase in popularity.

A Customer 360° view is consistently considered to be very important.

Change from 2021

Feature	%	Change from 2021
Surveys & Campaigns	51%	+4
Customer 360 View	48%	No Change
Early Warning System	43%	+1
Product Analytics	42%	-1
Health Score	36%	-4
Workflow Automation	35%	+4
Customer Portal	34%	+5
Task / Touchpoint Management	32%	-1
Reports & Dashboards	26%	+2
Playbooks	17%	-1
Dynamic Segmentation	16%	*New*

Intelligence

Working smarter, not harder.

There is no doubt that intelligent insights improve the lives of CS Teams. We've found a large majority of participants believe in its power, but many are unsure about how to implement intelligent processes.

——

In this section, see how CS Teams are currently using intelligence and where they hope to integrate it in the future.

How important is the availability of **actionable customer intelligence** to the success of your CS program?

88% say actionable customer intelligence is **important or extremely important.**

THE SMART TAKE

There is a **nearly universal recognition (88%)**—across all company sizes, team sizes, roles, and countries—of the importance of actionable customer intelligence.

The road to customer success starts with an accurate and actionable understanding of customers.
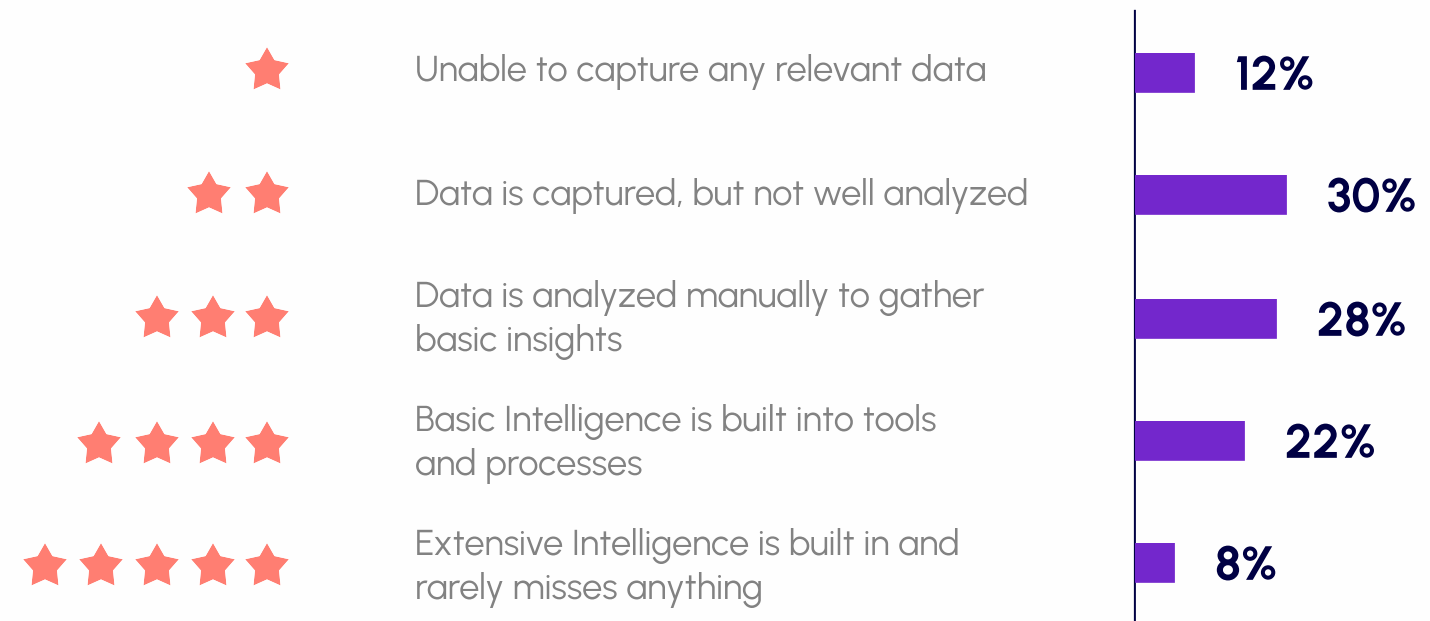

8%
Neutral

3%
Not Important

**56%
Extremely
Important**

**32%
Important**
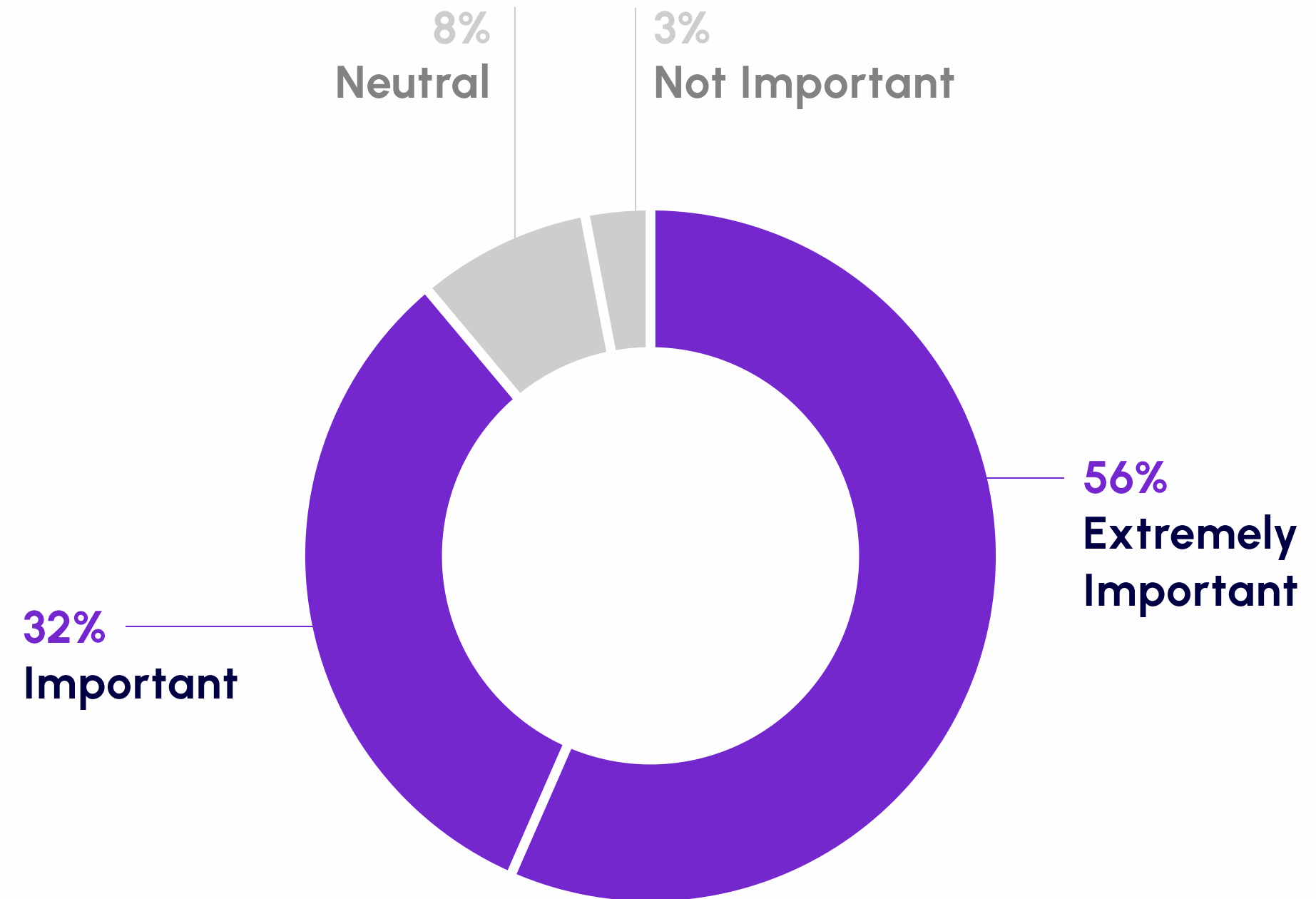
How would you rate your organization's current process for **capturing Customer Intelligence?**

70% of organizations are struggling with their current customer intelligence process

THE SMART TAKE

Teams are struggling with **making sense of data** (30%), **manual analysis** (28%), and **capturing data** (12%).

It's clear that teams of all sizes aren't happy with their current data-capturing capabilities. However, we see there is an understanding of the importance to not only capture data, but accurately analyze it.

Rating	Description	%
★	Unable to capture any relevant data	12%
★★	Data is captured, but not well analyzed	30%
★★★	Data is analyzed manually to gather basic insights	28%
★★★★	Basic Intelligence is built into tools and processes	22%
★★★★★	Extensive Intelligence is built in and rarely misses anything	8%

	Rating	Stars
Average Rating	**2.8/5**	★★★
Large Teams	2.8/5	★★★
Medium Teams	2.8/5	★★★
Small Teams	3/5	★★★

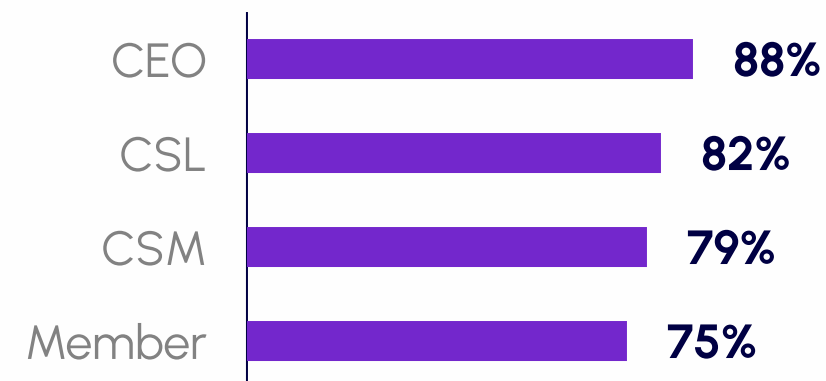Agree or Disagree? Artificial Intelligence (AI) will make customer success management **more effective.**

79% agree that Artificial Intelligence will make CS management more effective.
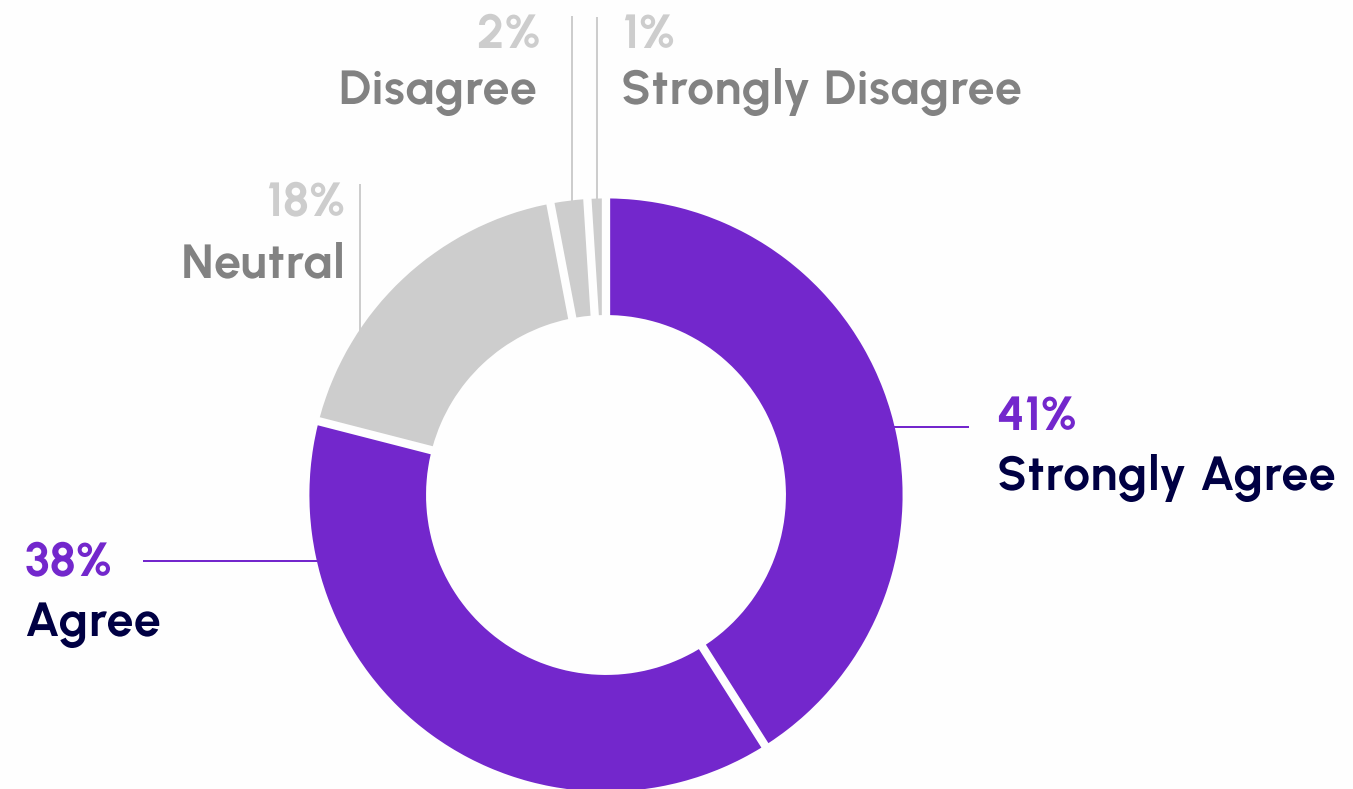
THE SMART TAKE

The data reflects the **growing confidence** in the power of AI and CS at the highest levels, particularly for augmenting business effectiveness and efficiency.

2% **Disagree**

1% **Strongly Disagree**

18% **Neutral**

41% **Strongly Agree**

38% **Agree**

Belief in AI Effectiveness by Role

Role	
CEO	88%
CSL	82%
CSM	79%
Member	75%

Belief in AI Effectiveness by Region

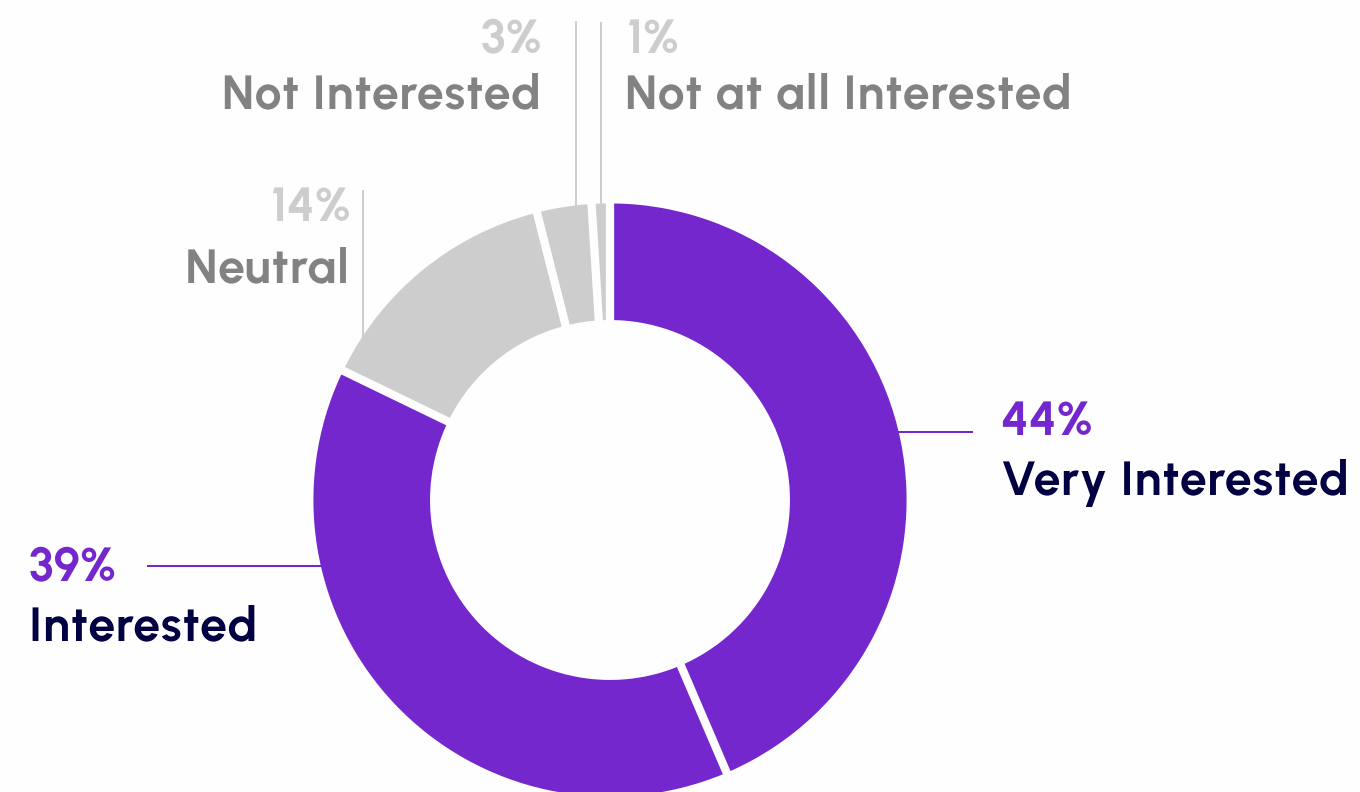| Region	
US	84%
APAC	81%
Europe	67%

How interested are you in using an **AI Customer Success Assistant** that could understand natural language commands, send reminders, answer questions, make suggestions, and perform requested tasks?

83% are interested in using an AI Customer Success Assistant.

3%
Not Interested

1%
Not at all Interested

14%
Neutral

44%
Very Interested

39%
Interested

THE SMART TAKE

There is a high amount of interest in using an AI Customer Success Assistant across all roles, but the interest is **slightly higher in the US** compared to other regions.

Interest in CS AI Assistant by Region

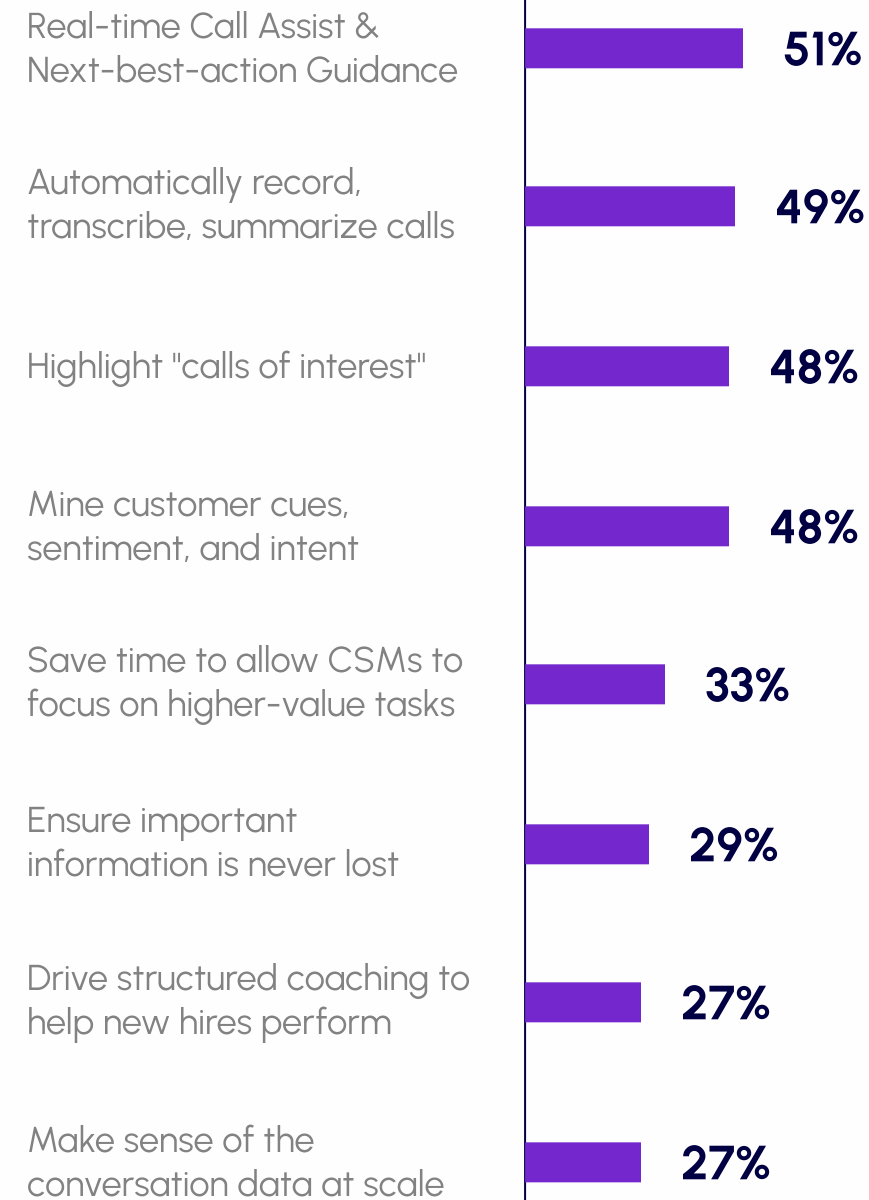| Region	Percentage
US	88%
APAC	73%
Europe	70%

The interest in utilizing an AI CS Assistant is slightly higher in the US compared to other regions.

Which of the following **benefits of call/conversation intelligence** would be most useful to you?
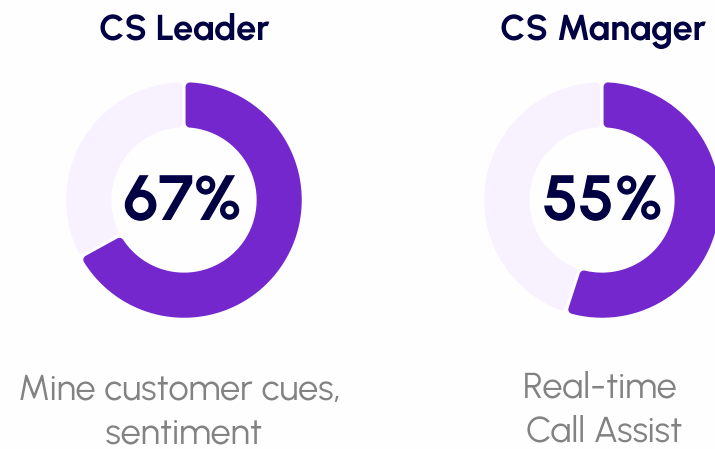
51% say real-time call assists and next-best action guidance is the top benefit.

Benefit	%
Real-time Call Assist & Next-best-action Guidance	51%
Automatically record, transcribe, summarize calls	49%
Highlight "calls of interest"	48%
Mine customer cues, sentiment, and intent	48%
Save time to allow CSMs to focus on higher-value tasks	33%
Ensure important information is never lost	29%
Drive structured coaching to help new hires perform	27%
Make sense of the conversation data at scale	27%

Most Useful Benefit by Role

CS Leader
67%
Mine customer cues, sentiment

CS Manager
55%
Real-time Call Assist

Most Useful Benefit by Team Size

Small
68%
Save time for CSMs

Medium
51%
Real-time Call Assist

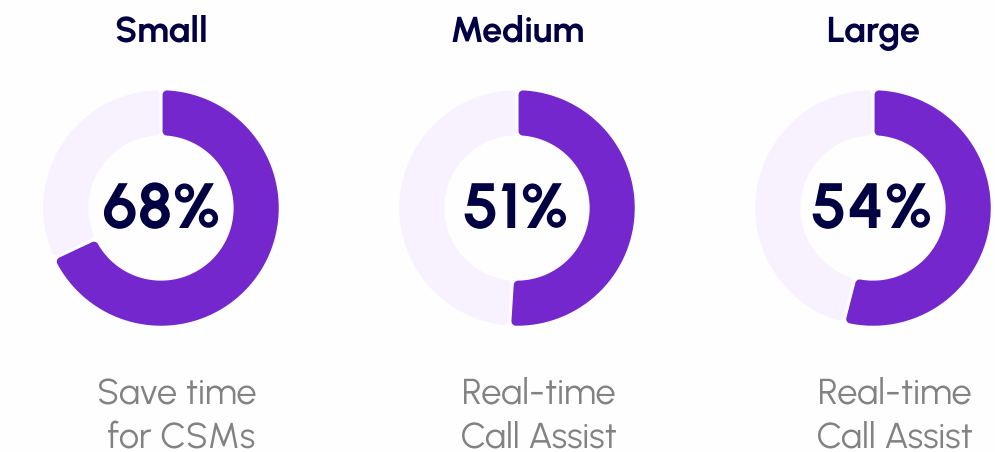**Large**
54%
Real-time Call Assist

THE SMART TAKE

Due to the difference in demands between their roles, while Customer Success Managers value **real-time call assistance** the most (55%), for Customer Success Leaders it's the ability to **mine customer sentiment at scale** (67%).

Which of the following **advanced features** of an intelligent CS solution will be most useful to you and your team?

49% say accurately predicting future events is the most useful.

Feature	%	Change from 2021
Accurately predicting future events *(risks, opportunities, outcomes)*	49%	No Change
Near-perfect customer understanding *(needs, issues, sentiment)*	44%	No Change
Recommending the best course of action for any given scenario	39%	+1
Learning from past experiences to improve future outcomes	38%	-1
End-to-end augmented intelligence to help CS teams make better decisions	36%	+3
AI-powered personal assistant	34%	+5
Advanced, intelligent automation	33%	-1
Team learning, collaboration, and performance intelligence	32%	-3
Call / Conversation Intelligence	26%	*New*
Supporting multiple products, business units, languages, currencies	22%	*New*
Fostering more transparency with teams and customers	14%	-4

THE SMART TAKE

Compared to 2021, an **AI-powered personal assistant** and **end-to-end augmented intelligenc**e have seen the largest increase in popularity. The market demand for these features leads us to believe in the power of AI / Augmented Intelligence to **make Customer Success simpler, more powerful, and intuitive.**

Which of the following **advanced features** of an intelligent CS solution will be most useful to you and your team?

49% say accurately predicting future events is the most useful.

THE SMART TAKE

Compared to 2021, an **AI-powered personal assistant** and **end-to-end augmented intelligenc**e have seen the largest increase in popularity. The market demand for these features leads us to believe in the power of AI / Augmented Intelligence to **make Customer Success simpler, more powerful, and intuitive.**

THE CEO PERSPECTIVE

The top 3 advanced features sought by CEOs are **AI-powered assistant (44%), Predicting future events (43%), and Augmented intelligence (40%).**

Companies of all sizes—enterprise, midsize, small—**agree that accurately predicting future events** is the most useful feature.

Agree or Disagree: **At its best, automation makes customer success more human, not less.**

It will free up time (from low-value, repetitive tasks) for CSMs to focus on nurturing more human-to-human customer connections and experiences.
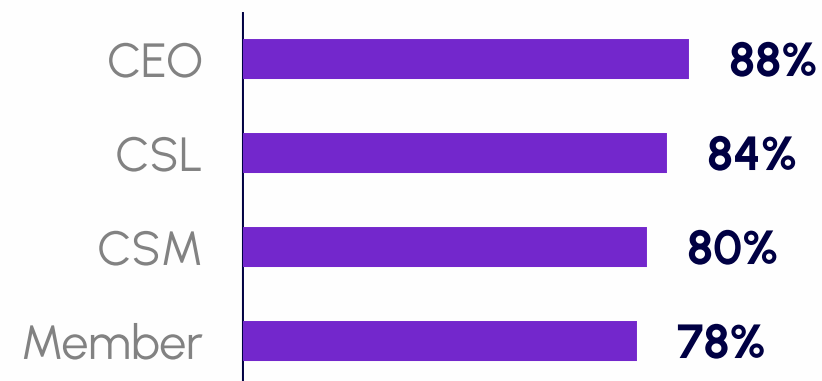
83% agree!

5%
Disagree

1%
Strongly Disagree

12%
Neutral

**44%
Strongly Agree**

**39%
Agree**
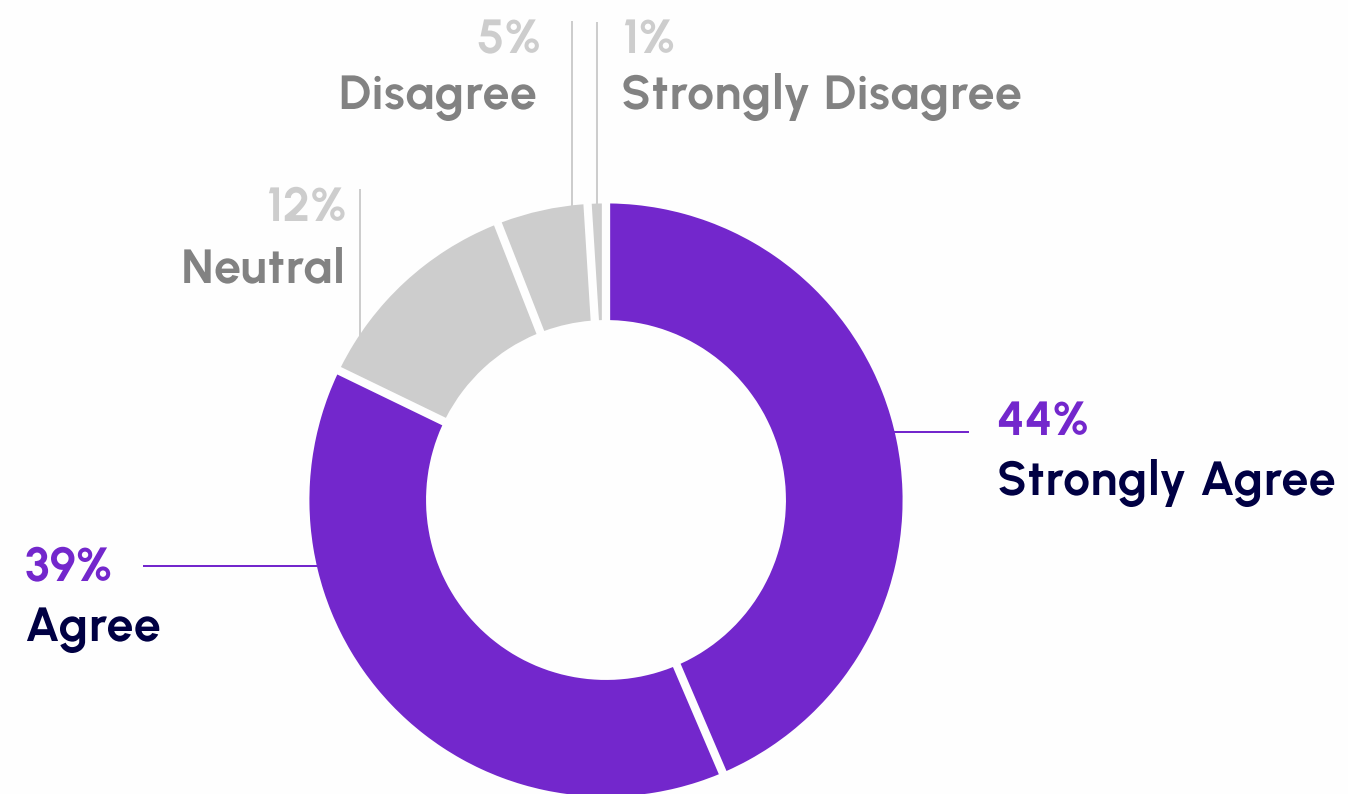
Belief in Automation Effectiveness by Role

Role	%
CEO	**88%**
CSL	**84%**
CSM	**80%**
Member	**78%**

THE SMART TAKE

The data reflects the **growing confidence** in the power of AI and CS at the highest levels, particularly for augmenting business effectiveness and efficiency.

In general, everyone agrees, but their **agreement becomes stronger as they rise in the ranks.**

Automation

Driving efficiency at scale.

Automation can be a scary word. For some, it means their role is being replaced by a robot. For others, it means a helping hand to get the job done faster and with more consistency. We believe in the latter and see automation as a way to help CS Teams, not replace them.

——

In this section, see how the industry views automation, where it is currently benefiting them, and how they plan to introduce automation into their current workflows.

How important is automation
to your customer success operations?

86% agree automation is important (or extremely important) for their CS operations.
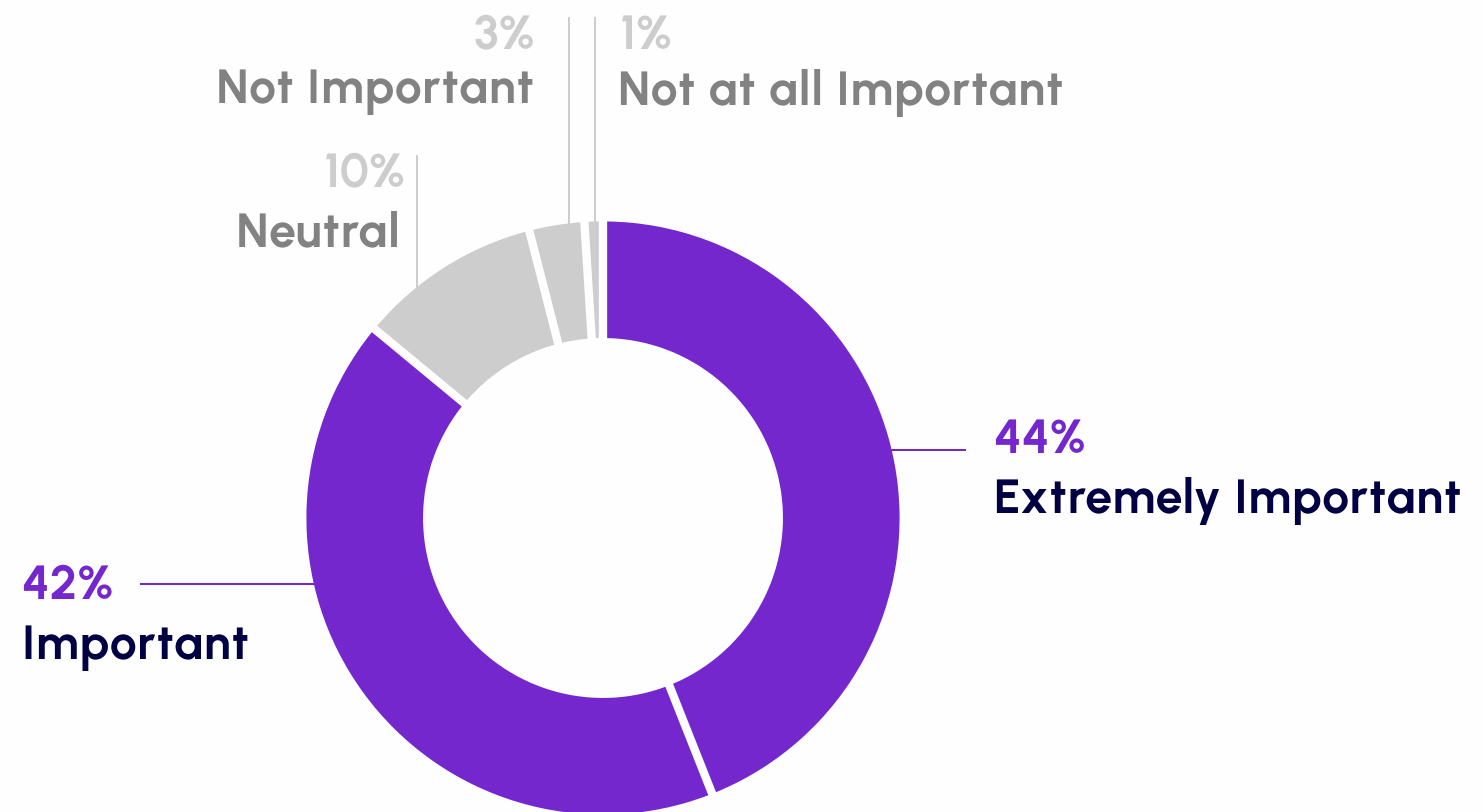
THE SMART TAKE

There are varying levels of agreement across roles and regions with s**tronger agreement across higher roles as well as in the US and APAC.**

3%
Not Important

1%
Not at all Important

10%
Neutral

44%
Extremely Important

42%
Important

Belief in AI Effectiveness by Role

CEO **60%**
CSL **45%**
CSM **39%**
Member **37%**

Belief in AI Effectiveness by Region   ■ 2022 ■ 2021

US **55%** / 34%
APAC **44%** / 47%
Europe **17%** / 65%
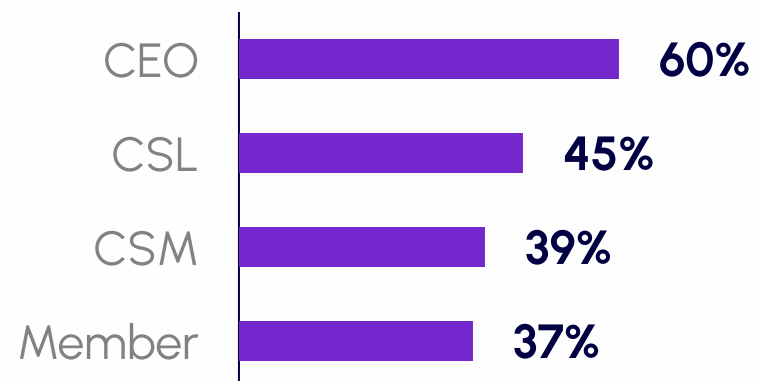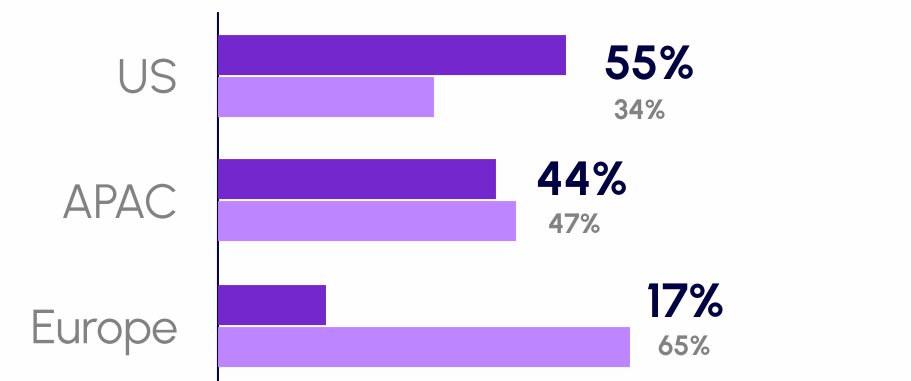
How **automated** are your **current** customer success operations?

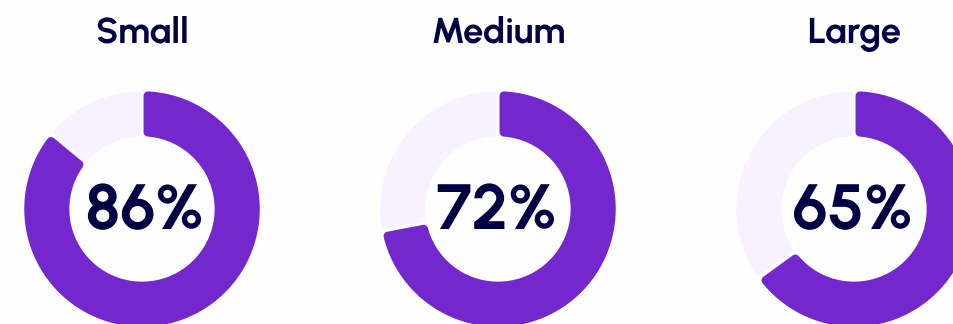# 71% say their current level of automation in CS operations is **very low to moderate.**

3%
Very High

15%
Very Low

22%
High

20%
Low

37%
Moderate
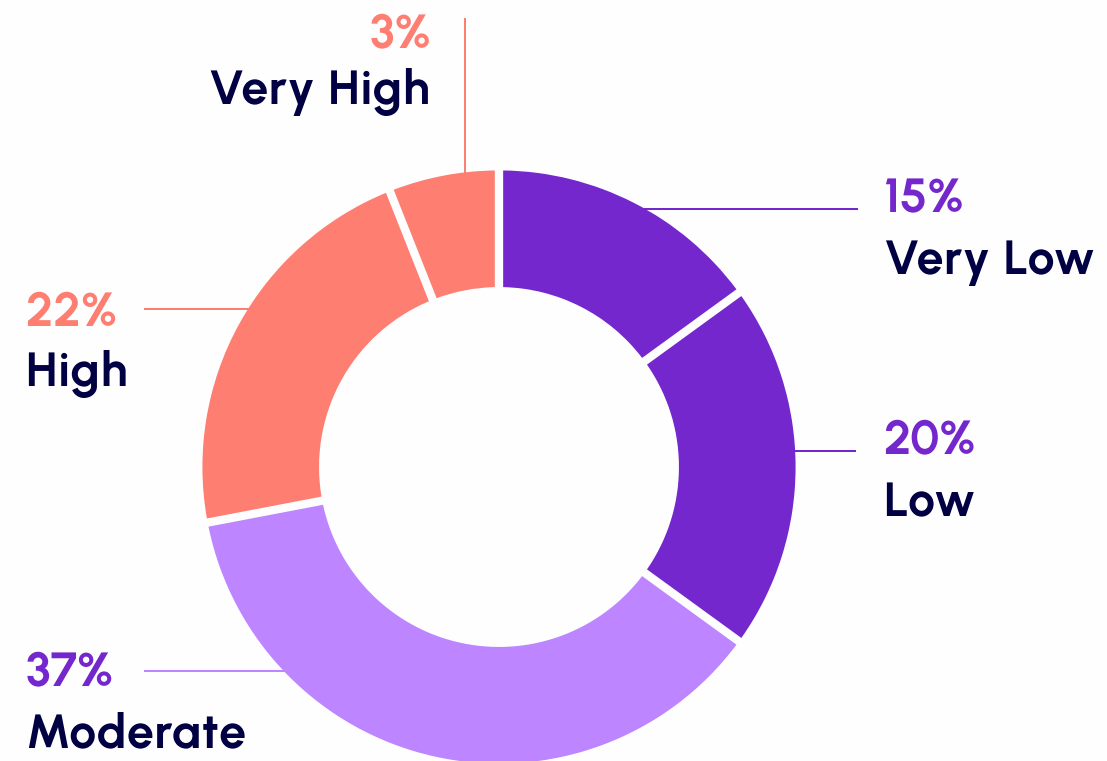
Need for Automation by Team Size

Small	Medium	Large
86%	72%	65%

In the last year, how has the **level of automation changed** in your customer success operations?

69% report an increase (or significant increase) in their level of automation

The increase in automation adoption can be attributed to the **influx of fast-scaling companies,** CS process **maturity,** the need for operational **efficiency,** availability of intelligent and **personalized automation, innovation in AI,** and more.
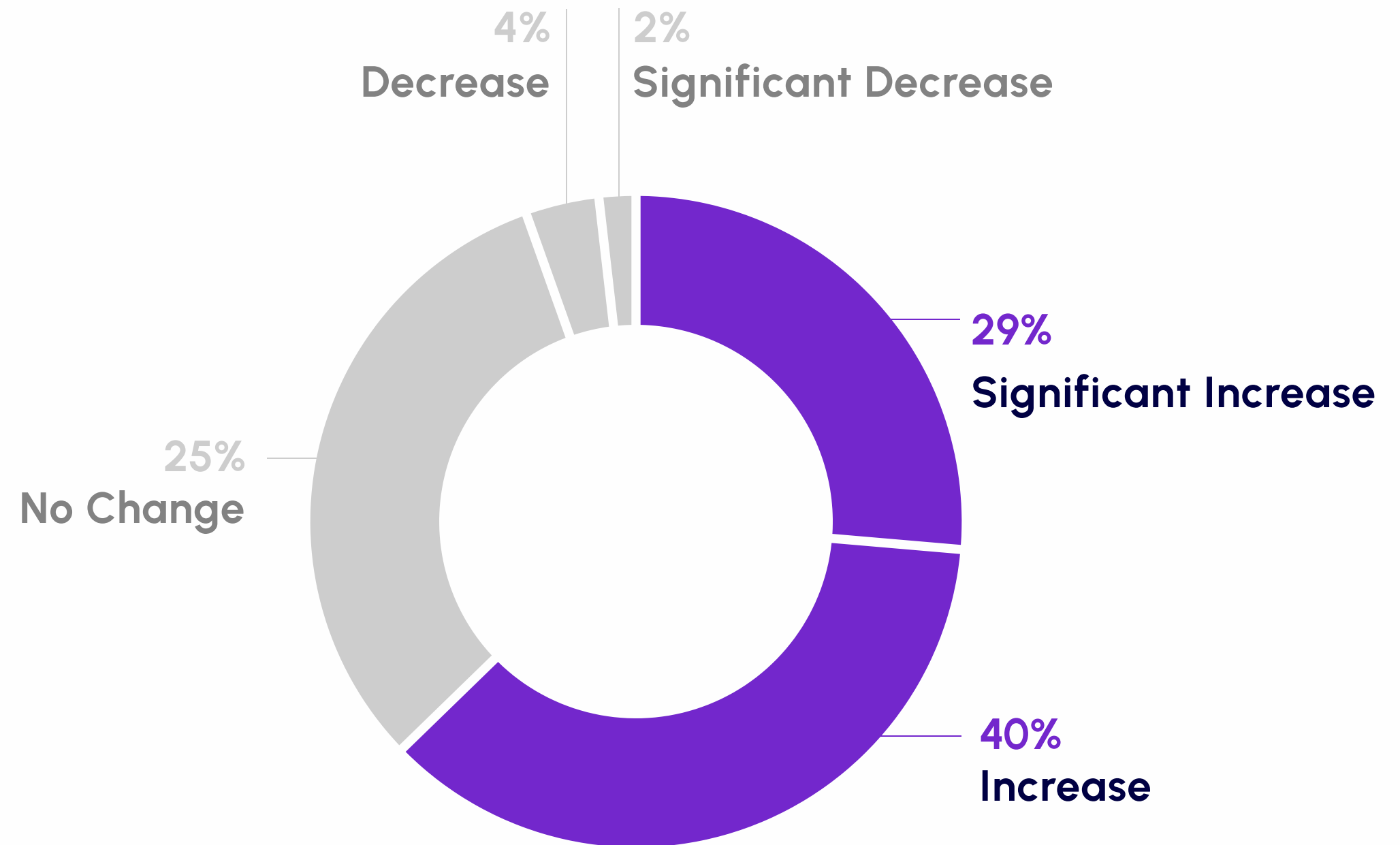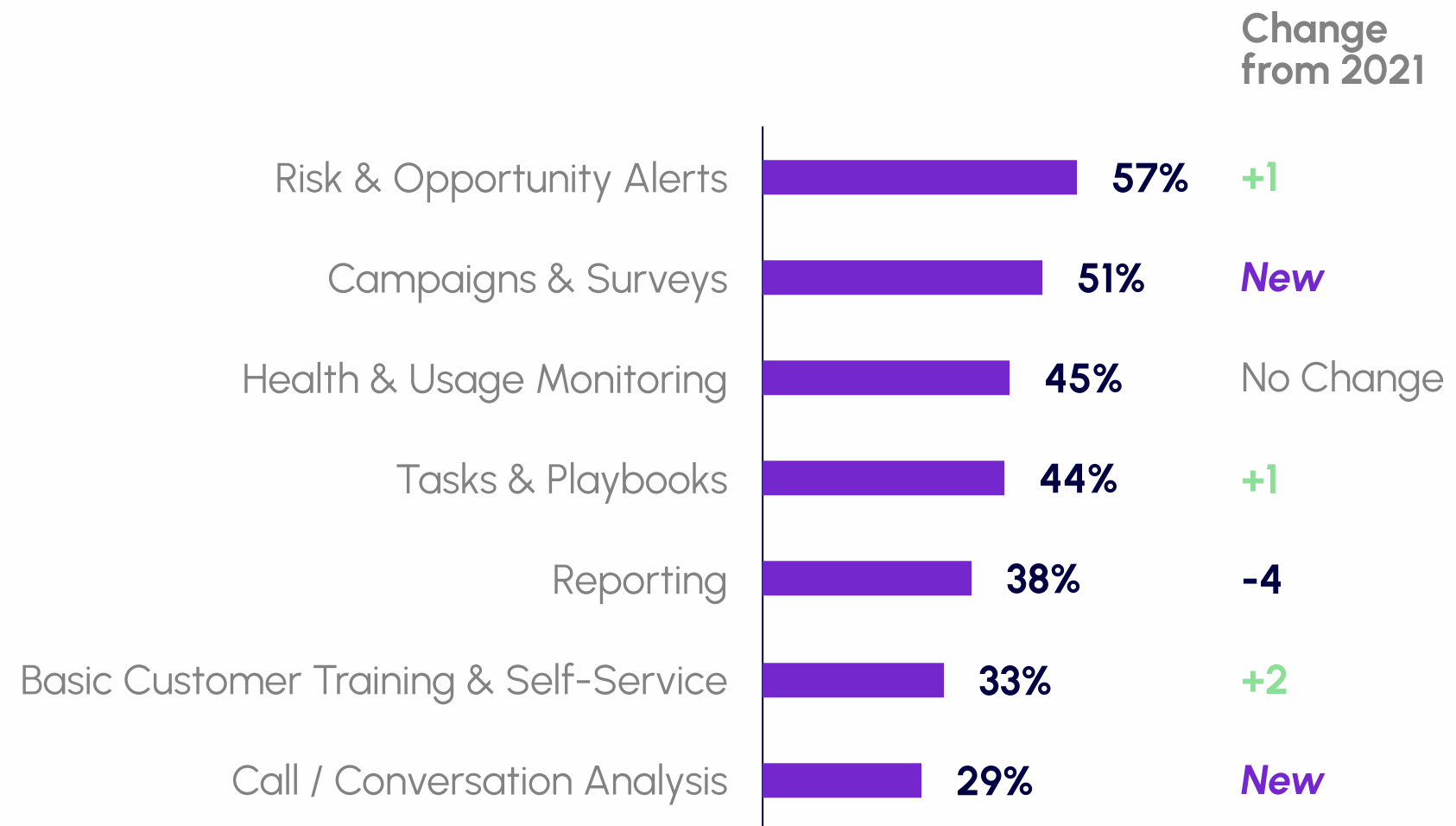

4%
Decrease

2%
Significant Decrease

29%
Significant Increase

25%
No Change

40%
Increase

Which of the following areas should be **automated the most?**

57% say risk and opportunity alerts should be automated the most.

Change from 2021

Risk & Opportunity Alerts	**57%**	+1
Campaigns & Surveys	**51%**	*New*
Health & Usage Monitoring	**45%**	No Change
Tasks & Playbooks	**44%**	+1
Reporting	**38%**	**-4**
Basic Customer Training & Self-Service	**33%**	**+2**
Call / Conversation Analysis	**29%**	*New*

THE SMART TAKE

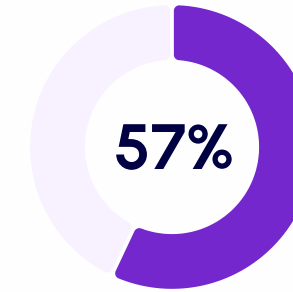**Risk and opportunity alerts** are the most-preferred areas for automation across **all roles, team sizes, company sizes, and regions.**
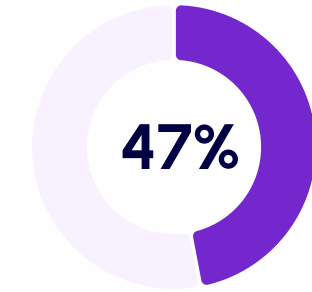
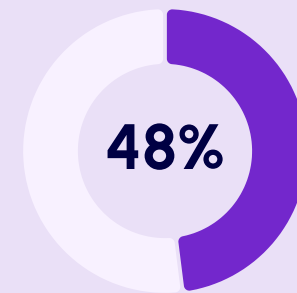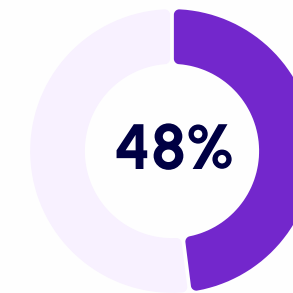Which of the following areas should be **automated the most?**

57% say risk and opportunity alerts should be automated the most.

Large
100+
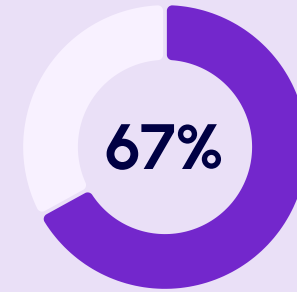
| 67% | 57% | 47% |
| Alerts | Campaigns | Playbooks |

Medium
26 – 99
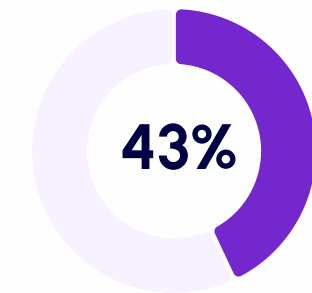
| 48% | 48% | 43% |
| Alerts | Campaigns | Health & Usage Monitoring |

Small
1–25
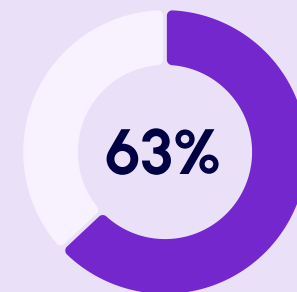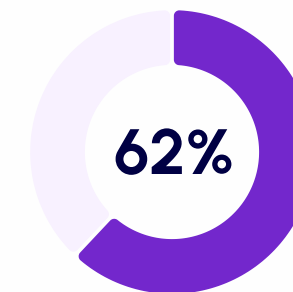
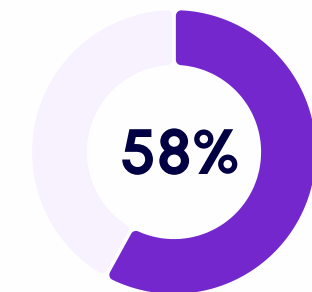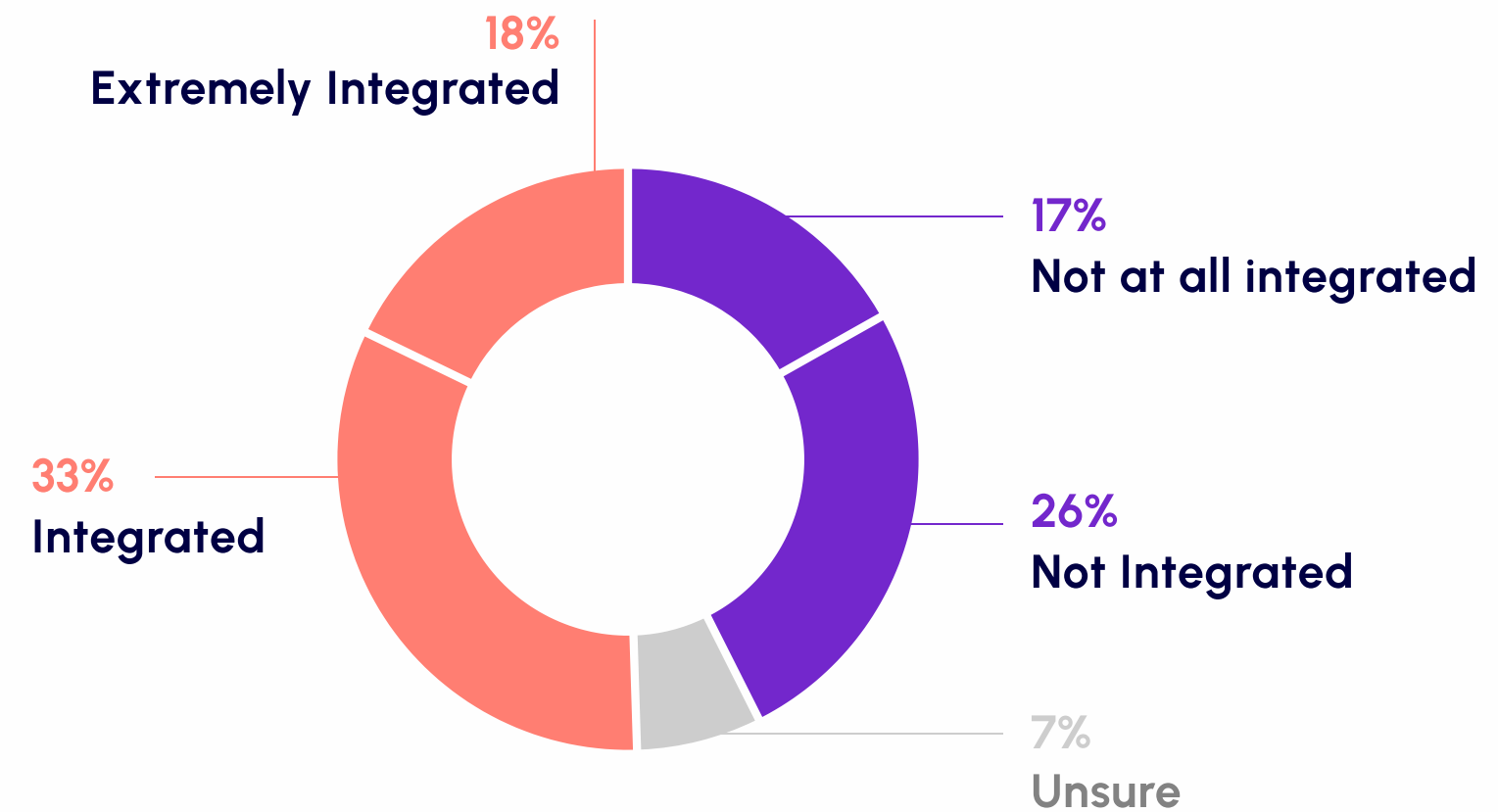| 63% | 62% | 58% |
| Alerts | Reporting | Health & Usage Monitoring |

How **integrated** are your current **CS workflows, analytics, and automation?**

50% say they are not integrated (or they are not aware)

18%
Extremely Integrated

17%
Not at all integrated

33%
Integrated

26%
Not Integrated

7%
Unsure

Need for Integration by Team Size

Small
55%

Medium
50%

Large
36%

THE SMART TAKE

Half of the respondents say their CS workflows, analytics, and automation are **extremely siloed** (17%), not integrated (26%), or they are not aware of any integration (7%) — **representing a significant desire for comprehensive integration.**
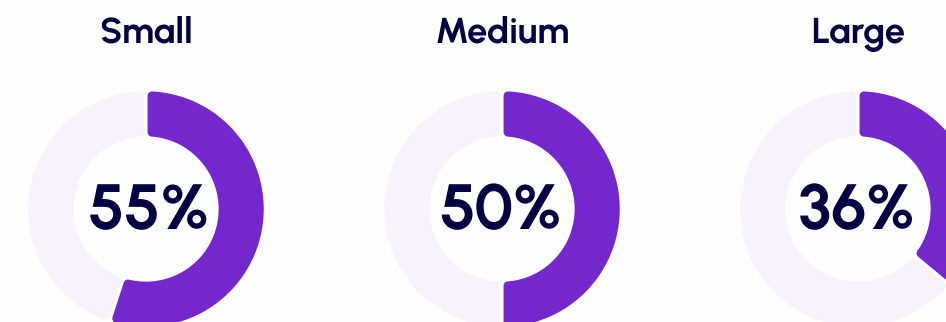
☼ **The Future of CS**

Looking toward 2023 and beyond.

As Customer Success becomes more mainstream, we expect to see a lot of innovators in the space pushing the boundaries and providing new ways of improving the customer journey.

———

In this section, see predictions from practitioners, stakeholders, and CEOs.

Do you agree with them? Let us know on **LinkedIn.**

AGREE OR DISAGREE

There will be **significant changes to our customer success tech stack** (innovation, specialization, and consolidation) over the next two years.

79% Agree

THE SMART TAKE

More than three quarters (79%) think that their **CS tech stack will undergo significant change** in the next two years. (an additional 17% agree but feel the process will take longer.)

In 2021, only 70% believed that their CS tech stack will undergo significant change over the course of two years.

Consolidation of the CS tech stack is increasing in popularity, **enabling customer-centric businesses to gain unified, strategic, and actionable visibility** into their customers at an organizational level.

4%
Disagree

1%
Strongly Disagree

17%
Agree
(but not in 2 years)

31%
Strongly Agree

48%
Agree
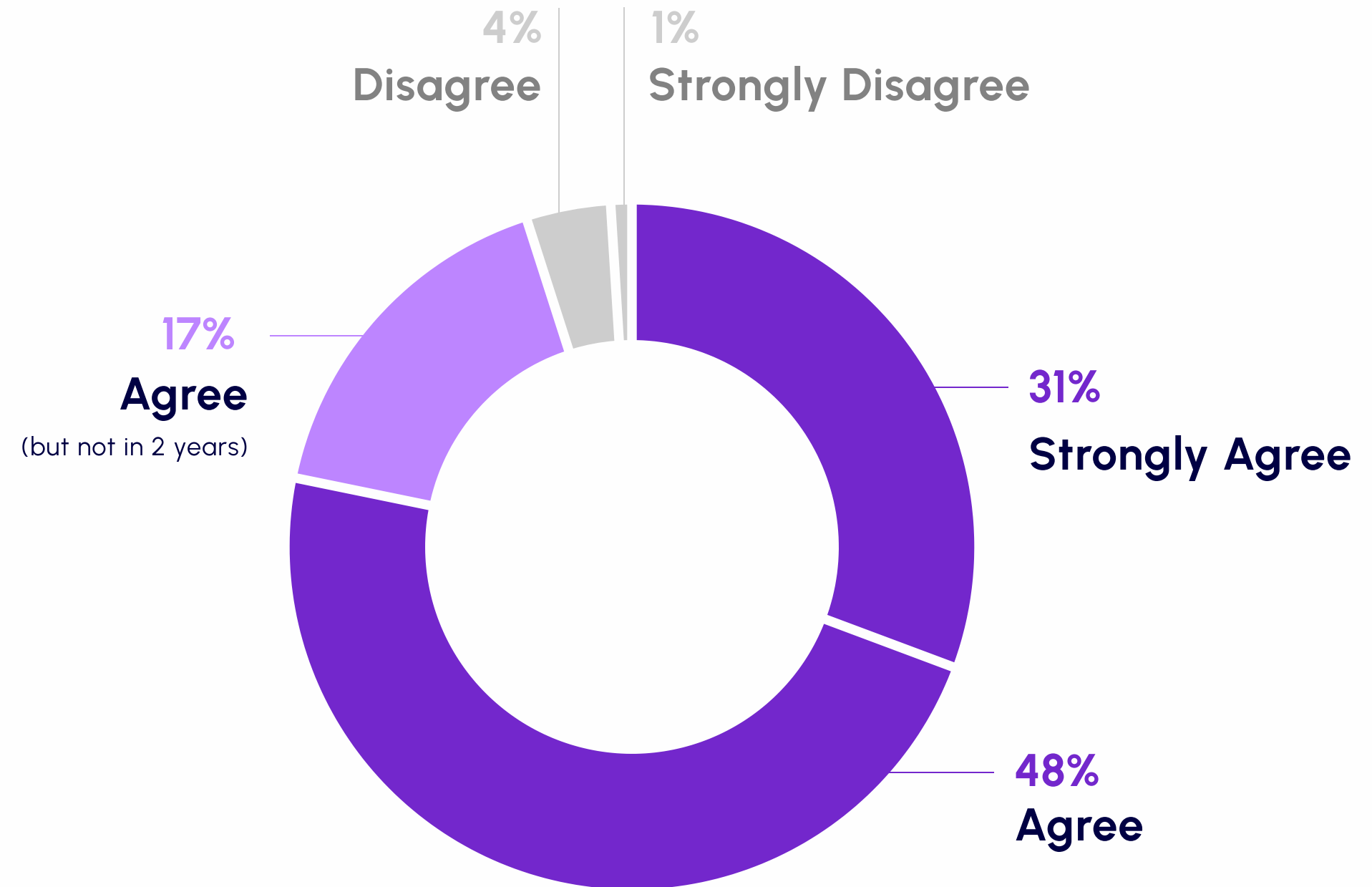
AGREE OR DISAGREE

Artificial Intelligence (AI) adoption in customer success will **become mainstream** in the next two years.

72% Agree

THE SMART TAKE

Close to three quarters (72%) feel that AI adoption in CS will become mainstream in the next two years. **However, a reasonable portion (21%) feel it will take longer.**

In 2021, only 57% believed that AI adoption in CS will become mainstream over the course of two years.

We see a lot of demand for the CS capabilities that AI unlocks and believe that **sooner or later, AI will become integral to a CSM's daily life.**

6%
Disagree

0%
Strongly Disagree

21%
Agree
(but not in 2 years)

27%
Strongly Agree

45%
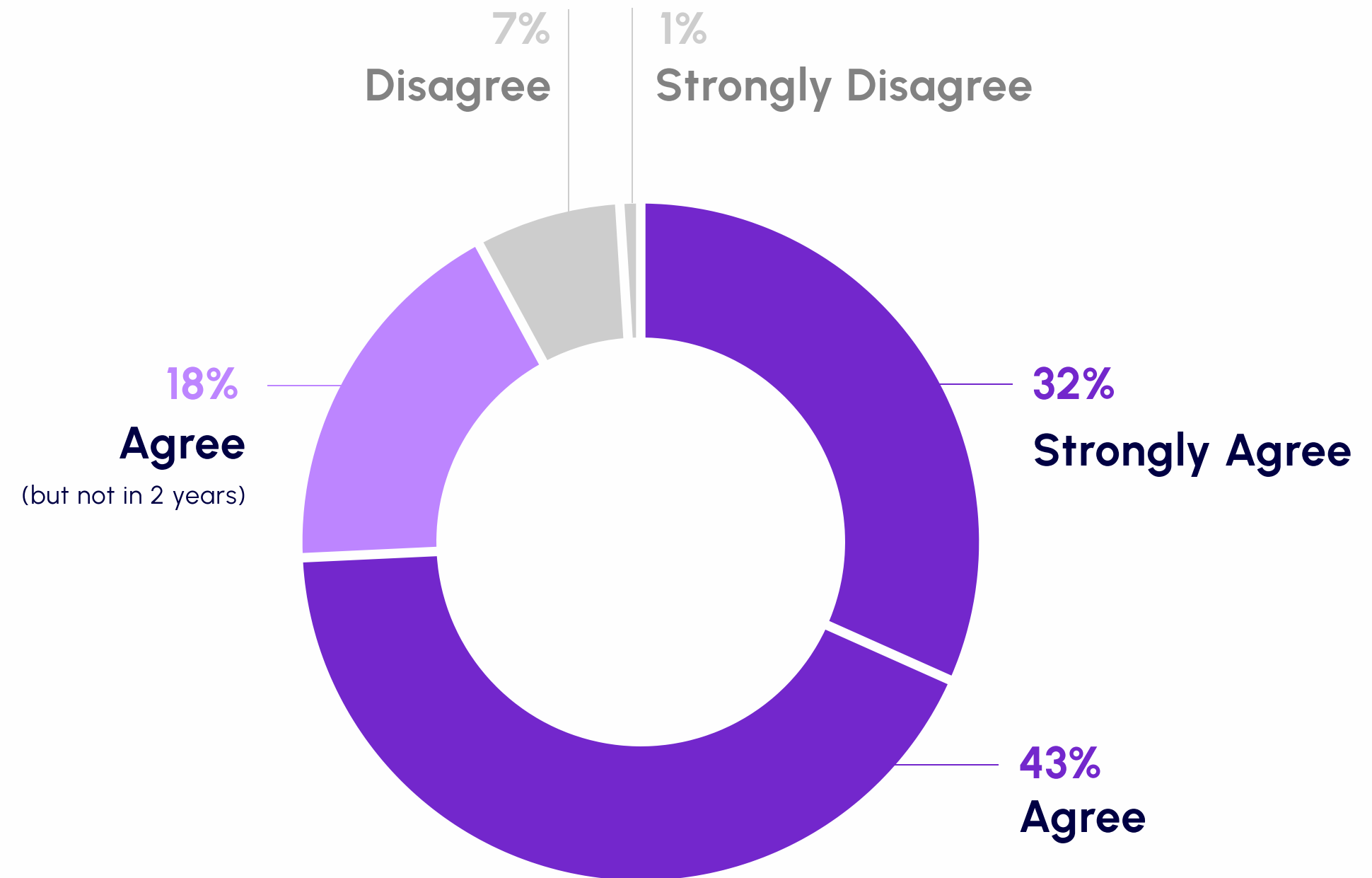**Agree**
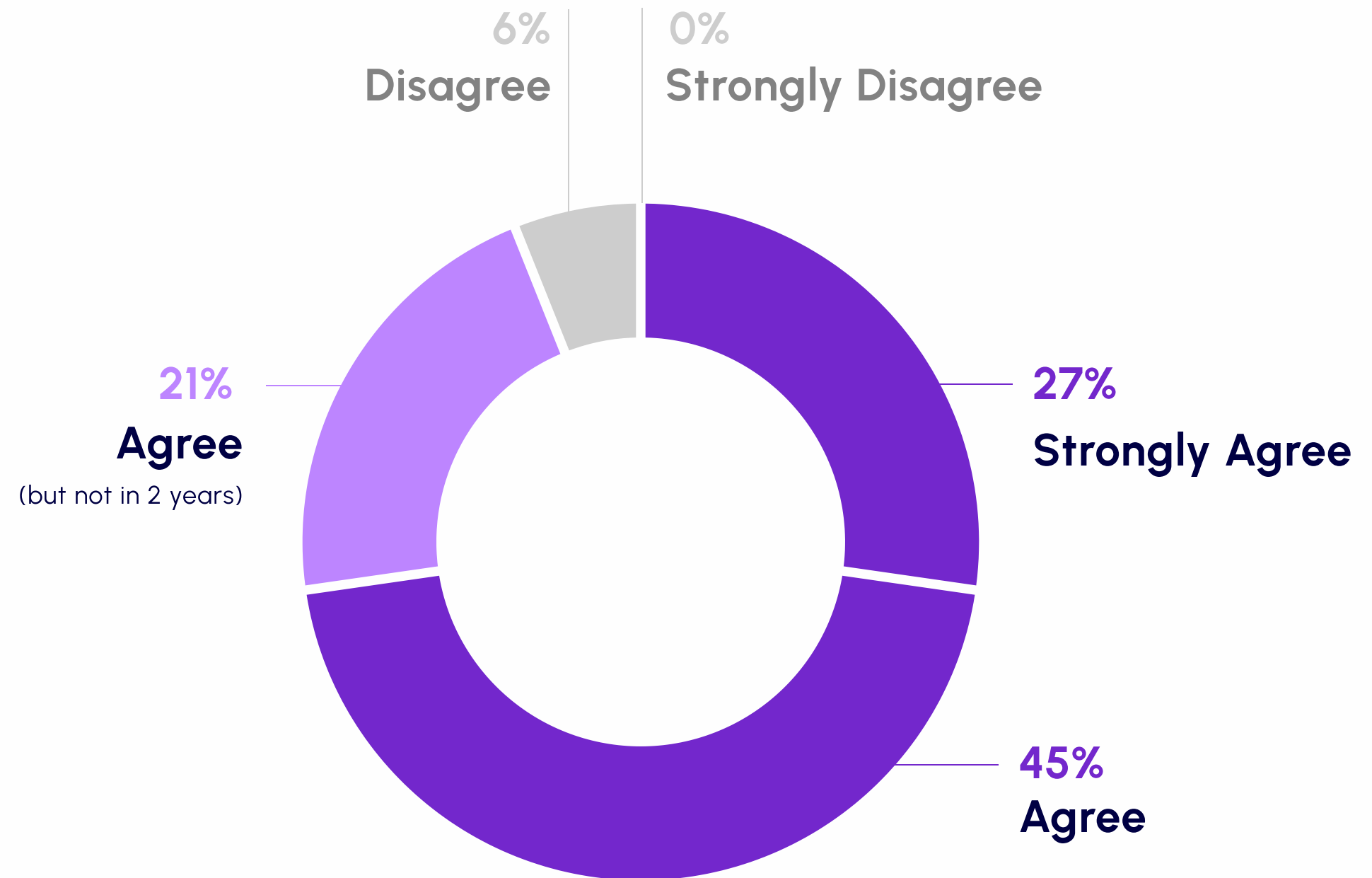
AGREE OR DISAGREE

Smart intelligence and automation will play a significant role in **scaling customer success** over the next two years.

75% Agree

THE SMART TAKE

A large majority (75%) feel that intelligence and automation will play a significant role in scaling CS over the next two years. (An additional 18% agree but feel it may take longer.)

Smart intelligence and automation can help CS teams scale results (not just grow) without an additional strain on resources.

7%
Disagree

1%
Strongly Disagree

18%
Agree
(but not in 2 years)

32%
Strongly Agree

43%
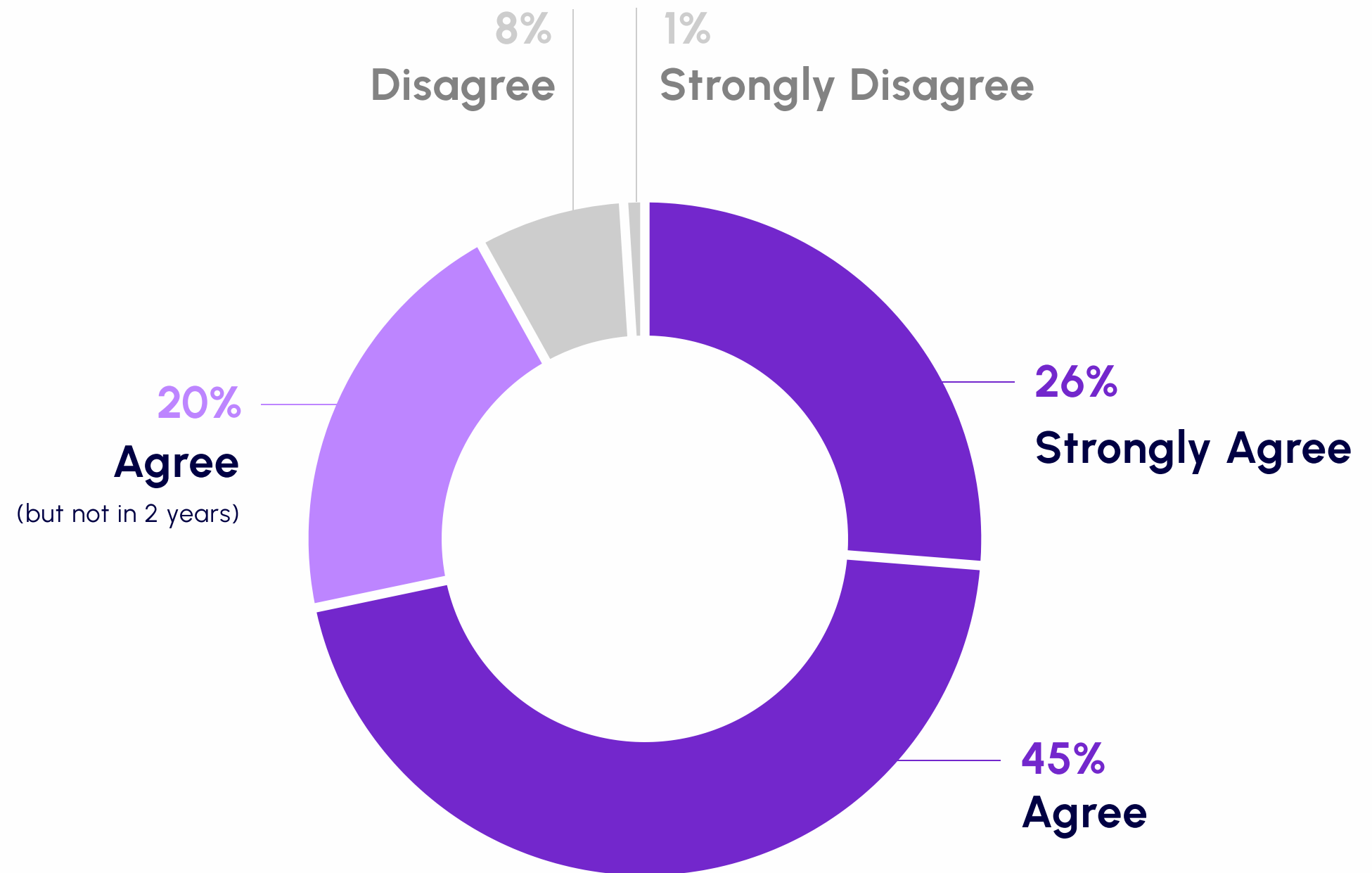**Agree**

AGREE OR DISAGREE

Customer Success will evolve from a **defensive, "churn buster"** role to an **offensive, "earn booster"** function over the next two years.

71% Agree

THE SMART TAKE

A large majority (71%) feel that CS will evolve from a defensive, churn-fighting role to an **offensive, growth-driving function** in the next 24 months. (An additional 20% agree but feel it may take longer.)

Although CS has its roots in churn prevention (defence), customer-centric companies have been evolving it into a growth driver (offence)

8% **Disagree**

1% **Strongly Disagree**

26% **Strongly Agree**

20% **Agree** (but not in 2 years)

45% **Agree**

AGREE OR DISAGREE

Customer Success **adoption in Non-SaaS industries** will accelerate rapidly over the next two years?

70% Agree

THE SMART TAKE

A large majority (70%) feel that CS adoption in non-SaaS industries will accelerate rapidly over the next two years. (An additional 20% agree but feel it may take longer.)

Although CS originated in the SaaS industry, it solves a universal, industry-agnostic problem.

It's only a matter of time until non-SaaS industries adopt CS practices.

9%
Disagree

1%
Strongly Disagree

26%
Strongly Agree

20%
Agree
(but not in 2 years)

44%
Agree
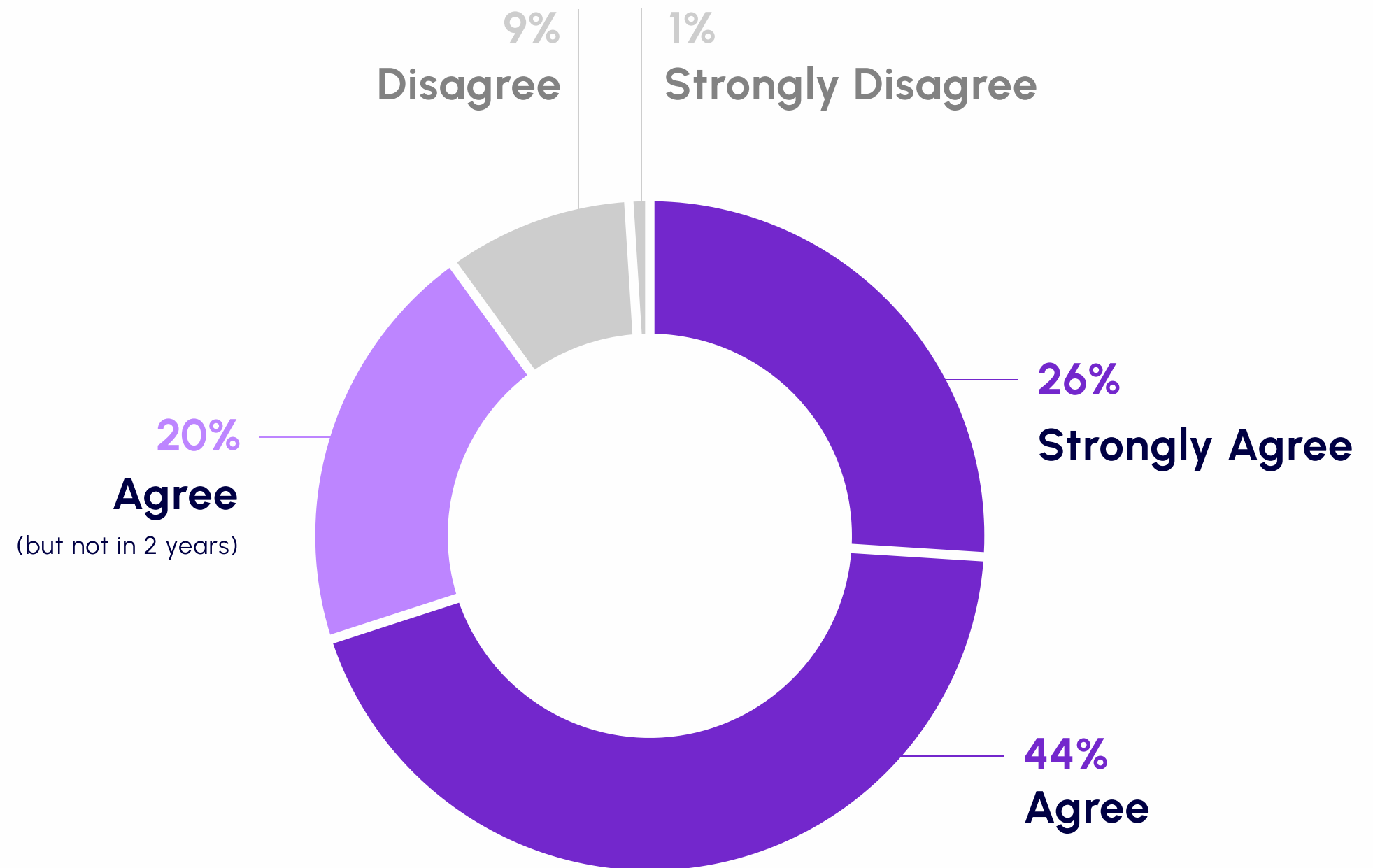
Thank you to all participants.

Share your Thoughts!

on LinkedIn

Customer Success is Evolving Fast

When we look toward the future of CS, we need to consider the foundation that has been built in the industry.

Automation and intelligence should function as an additional tool in the CS Team's toolbelt and assist them in their effort to enhance the overall customer journey. **Without some level of automation and intelligence, CS Teams will miss out on opportunities to improve customer outcomes at scale.**

We are in the new frontier. Timely intelligence and thoughtful automation provide a major opportunity for customer-centric organizations to understand and help make their existing customers successful on an ongoing basis. We can't wait to be a part of your growth and look forward to another year of intelligent automation at scale!

Prithwi Dasgupta
Founder & CEO, SmartKarrot

The annual SmartKarrot Global Customer Success Survey provides a yearly view of trends shaping the Customer Success industry.

The 2021 edition offers key insights on the state of Intelligence and Automation in Customer Success.

SmartKarrot is an intelligent customer success platform that drives predictable and repeatable success. From onboarding to advocacy, SmartKarrot helps enterprises and SMBs implement and scale Customer Success.

Get a short, free demo with one of our Customer Success Experts.

Book a Demo

Global Survey Report 2022
Customer Success Intelligence & Automation

Get more insights at

smartkarrot.com