



Marketing & Sales
Excellence Initiative

Customer Success Management: Taking Stock & Moving Forward

with **Brent COGSWELL** (Global Head of Customer Success, Global Services, Schneider Electric), **Deva RANGARAJAN** (Professor of Marketing and Sales, IESEG School of Management), **Wolfgang ULAGA** (INSEAD Professor) and **Christoph SENN** (INSEAD Professor)

27th June 2024, Virtual session (Zoom)



Overview: Customer Success Management: Taking Stock & Moving Forward

Customer Success Management (CSM) emerged in recent years as a fast-growing new function and role in many companies at the intersection of Marketing, Sales and Customer Support. Initially confined to the software industry, CSM is now gaining traction across the board, fuelled by the fast-paced digital transformation of markets. B2B leaders, too, hire more and more Customer Success (CS) managers and establish CS departments and processes in their firms. On the worldwide professional social network platform LINKEDIN alone, 200,000+ professionals describe their CSM roles and responsibilities, and in the US alone, the Customer Success Association accounts for close to 60,000 members.

Against this backdrop, we will explore the following questions: What exactly is Customer Success in a B2B context? What do B2B buyers expect from CSM? What is the ideal profile of a CS manager? What are his/her roles and responsibilities? When, why, and how does CSM work best? Where should CSM be anchored in the organization? How to integrate this new organizational role with other functions and units, such as business development, marketing, sales, key account management, or customer service?

The virtual event will start with a brief introduction by an academic speaker, followed by the keynote of an industry expert sharing first-hand his experience in leading a global Customer Success organization in his B2B company. We then break-out in small discussion groups for discussing insights gained and exchanging on CS practices before we return for a collective summary of findings.

Keynote Speakers



Brent COGSWELL

**Global Head of Customer Success, Global Services, Schneider Electric
Boston, MA, USA.**

Brent Cogswell is the Head of Customer Success for Schneider Electric leading the global transformation to define and implement a growing Customer Success practice supporting all recurring revenue. Schneider Electric a multinational company providing energy and automation digital solutions for efficiency and sustainability. Since recurring services are expected to grow twice faster than the rest of the group Customer Success is critical to support this.

Previously Brent was VP of Customer Care for NAM where he led the transformation to drive revenue and efficiencies by leveraging digital and low-cost locations. He brings 30+ years of leadership experience. With roles in regional support, direct account management, global process, Customer Care, and finally Customer Success. He has led global organizations of 600+ employees, he has developed proven leadership and people development skills, international experience and accumulated many examples of global, operational and customer success. He is a member of TSIA's Customer Success Advisory Board.

Brent lives in Rhode Island and is based out of Boston, MA USA. He is married with three grown children. Passions outside of work are boating, skiing and hiking.

Brent's LinkedIn profile: <https://www.linkedin.com/in/bcogswel/>

TSIA Customer Success Advisory Board: <https://www.tsia.com/advisory-boards#board-members>

Keynote Speakers (continued)



Deva RANGARAJAN

Professor of Marketing and Sales, IESEG School of Management, Paris, France.

Prof. Deva Rangarajan is a Professor of Marketing at IESEG School of Management in France. His main areas of research include B2B Industrial Marketing, Sales Force Management, Sales Enablement, Customer Success Management, and Customer Education in B2B contexts.

He is particularly interested in how customer-facing roles are being transformed by digital technologies. He has worked closely with many companies to consult and deliver, customized programs. The list of multinational companies he has worked with include Yanmar, Epiroc, ArcelorMittal, Atlas Copco, Schneider Electric, Siemens, Philips, Johnson and Johnson, Medtronic, Bostik, Johnson Controls, Doosan, Bekaert, AGC, SWIFT, Vesuvius, Milliken, etc.

Deva's LinkedIn profile: <https://www.linkedin.com/in/devarangarajan/>

Discussion Facilitators



Wolfgang ULAGA

INSEAD Professor of Management Practice in Marketing
Co-Director, INSEAD Marketing & Sales Excellence Initiative (MSEI)

Wolfgang works with senior executives and managers around the globe on building and growing competencies and skills in marketing and sales of products, services, customer solutions, and new digitally-driven cloud-based business models in both consumer and business-to-business (B2B) markets. His research focuses on how companies can unleash recurring revenue growth through offers integrating, hardware and software, data and analytics. He co-directs INSEAD B2B Marketing Strategies in a Digital World Executive Education open enrollment program, teaches in INSEAD MBA and Executive MBA classes, and directs the MSEI Subscription Business Bootcamp (SBB).

Wolfgang's LinkedIn profile: <https://fr.linkedin.com/in/wolfgang-ulaga-813a6916>

INSEAD faculty page: <https://www.insead.edu/faculty-research/faculty/wolfgang-ulaga>



Christoph SENN

INSEAD Adjunct Professor of Marketing
Co-Director, INSEAD Marketing & Sales Excellence Initiative (MSEI)

Christoph's passion is helping organizations build better business relationships. His current research activities focus on high-performance business relationships, customer-centric leadership, and corporate and business strategy implementation. He has run 500+ sales force improvement projects in cooperation with companies, such as ABB, BASF, Coca-Cola, DSM, Evonik, General Electric, Hoffmann-La Roche, Konica-Minolta, Maersk, Microsoft, Pfizer, Schindler, Schneider-Electric, Sonos, Swiss Re, Tetra Pak, Vodafone, WMF, and Zebra. He directs the INSEAD Research Consortium on «Breakthrough Business Relationships» and teaches in the INSEAD B2B Marketing Strategies open enrollment program.

Christoph's LinkedIn profile: <https://www.linkedin.com/in/christophsenn/>

INSEAD faculty page: <https://www.insead.edu/faculty-research/faculty/christoph-senn>

Programme Agenda: 27th June 2024

Virtual session information:

This event is an INSEAD MSEI community “members-only” event. For accessing the login information, a pre-registration is required.

For further information and for receiving an invitation to our virtual event, please contact Wai Yee FONG, MSEI Centre Manager, at waiyee.fong@insead.edu.

Date/ Time (CET)	Programme	Venue
27 th June 2024		
14:00 - 14:15	Welcome & Introduction: Customer Success - Taking Stock & Moving Forward Christoph SENN and Wolfgang ULAGA INSEAD MSEI Co-Directors	Zoom
14:15 - 14:45	Keynote Presentation 1: “Customer Success: Why, What & How?” Deva RANGARAJAN, Professor of Marketing and Sales, IESEG School of Management, Paris, France. Q&A with Speaker	Zoom
14:45 - 15:15	Keynote Presentation 2: “Customer Success @ Schneider Electric” Brent COGSWELL, Global Head of Customer Success, Global Services, Schneider Electric, Boston, MA, USA. Q&A with Speaker	Zoom
15:15 - 15:30	Short Break	
15:30 - 16:15	Break-Out Session: “Customer Success Management: From Theory to Practice” Discussion in small virtual break-out groups	Zoom
16:15 - 16:45	Group Report-Outs, Feedback Round with Speakers, MSEI Members and Faculty Christoph SENN and Wolfgang ULAGA Discussion in plenary (full virtual group)	Zoom
16:45 - 17:00	Wrap-Up & Outlook Closing comments, outlook on next MSEI events and activities	Zoom

Please note that MSEI reserves the right to adapt or change the program agenda any time depending on current circumstances.

Pre-Event Preparation

Online Survey:

Please complete a simple diagnostic survey [here](#) by **21 June 2024**.

Assignment:

Please read the following articles:

- Zoltners, Andris A., Prabhakant Sinha and Sally E. Lorimer (2019), "What Is a Customer Success Manager?" *Harvard Business Review Digital Articles*, 2-5.
- Eggert, Andreas, Wolfgang Ulaga, and Anna Gehring (2020), "Managing customer success in business markets: Conceptual foundation and practical application," *Journal of Service Management Research*, 4(2-3), 121–132.

Please also plan to share your own examples, experiences and questions throughout the event.

Suggested Further Reading and Youtube Videos:

- Hochstein, Bryan, Deva Rangarajan, Nick Mehta and David Kocher (2020), "An industry/academic perspective on customer success management", *Journal of Service Research*, 23 (1), 3–7.
- Hochstein, Bryan, Navar N. Chaker, Deva Rangarajan, Duane Nagel and Nathaniel N. Hartmann, (2021), "Proactive value co-creation via structural ambidexterity: Customer success management and the modularization of frontline roles", *Journal of Service Research*, 24(4), 601–621.
- Hochstein, Bryan, Clay M. Voorhees, Alexander B. Pratt, Deva Rangarajan, Duane M. Nagel, and Vijay Mehrotra (2023), "Customer success management, customer health, and retention in B2B industries", *International Journal of Research in Marketing*, 40(4), 912-932.
- **Customer Success Professional Handbook - Interview with Gainsight:**
Part 1: https://www.youtube.com/watch?v=KCxXlqHgmo4&list=PLFnndxjotfnl_Py-w0dT9v7rbmcqTTbGi&index=14
Part 2: https://www.youtube.com/watch?v=-R6h3DW79OU&list=PLFnndxjotfnl_Py-w0dT9v7rbmcqTTbGi&index=13

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