



Customer-centricity

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Hanish Patel:

I'm Hanish Patel, and this is *User Friendly*, the show where we explore emerging trends in tech, media, and telecom, and how they impact business, operations, and the world around you.

In the technology, media, and telecom industry, sectors are converging, business models are evolving, and consumer preferences are shifting, all leading to

a reshaping of the landscape. It's often said putting the customer at the heart of your business can deliver an exceptional customer experience, but it can be difficult to foster customer loyalty and satisfaction. With that in mind, how can organizations meet evolving customer needs and develop effective customer success strategies?

Joining me today on the *User Friendly* podcast to discuss how organizations

can lead the transformation to customer-centricity is Toya Del Valle, chief customer officer, leader of Customer Success, Customer Empower Education, Professional Services, and Customer Support at Cornerstone. And Marybeth D'Souza, principal and leader in customer marketing within our Technology, Media, and Telecom practice at Deloitte Consulting LLP.

Toya, Marybeth, welcome to the pod.

Toya Del Valle:

Thank you. I'm very pleased to be here.

Marybeth D'Souza:

Thanks for having us.

Hanish Patel:

So, before we dive into the topic of customer experience itself, Toya, I'd love it if you could give our listeners a better understanding of what you do as the chief customer officer and what some of your broader responsibility areas include and how those align with Cornerstone's overall objectives?

Toya Del Valle:

Sure. So, I am the chief customer officer at Cornerstone. And what an awesome opportunity to lead with my colleagues—and the over 4,000 employees at Cornerstone—our focus on customer-centricity. And when we talk about that, we really don't see it as a buzzword. I'm sure many folks have heard about customer-centricity in the past, but it really is something that drives everything that we do for each other as teammates and colleagues, and definitely for our customers.

So in my role, I'm leading our functions that focus every part of success—so, our customer success managers, our support team, professional services, customer education—and then really enable everything that we do to focus on the value and the outcome of the customers and their overall experience.

Our overall focus is on driving value. I lead that, and I'm proud to do that with the many team members at Cornerstone.

Hanish Patel:

Firstly, thank you for that, and I want to drill in on something you said about that “driving value.” And given that obviously “customer” is in your title, as the chief customer officer, when you think about that value aspect, how do you define customer-centricity within your organization—with again, value at the forefront, as you highlighted?

Toya Del Valle:

Sure. And I'll say that's something that we don't define, necessarily. It's something that our customers define. It's our responsibility to understand what that value means for each of our customers. So in the space of empowering individuals to be their best self for a future-ready workforce, it's our responsibility to work with each and every one of our customers to know how they're driving that. Also, how we can influence how we're driving that based on our talent, our knowledge, our network of customers, and how the world is continuing to evolve. But we work with customers to define what that value means to them, and we use our solutions and our people to drive and to exceed that.

So, it's different for every customer. The customer determines what that is. It's our requirement and role to align to that, to ensure that we're meeting that for every customer. And at some point, I can provide some specific examples of what I mean by value as well.

Hanish Patel:

Let's just dive into that, because I'd love to anchor in on that value piece. I'd love to get those examples of how that's really being executed.

Toya Del Valle:

Sure. So, here's one. We're a technology company, and a “technology in the people space” is what I like to call it. But what we're doing is that we're ensuring that the companies that we work for can provide solutions for the world.

So an example that I'll provide is that when I think about perhaps one of our customers that's in financial services, our goal is not to provide a solution or tool for them for success. In the end, what we're doing is that we are working with them so that individuals that work for them are working in new roles that maybe they didn't know that they can be in a role. They're using our learning solutions, they're using our products and our services, to maybe have

a job they never thought they could have before. Those are the types of things when I talk about value.

Perhaps that same financial services institution is now opening up branches, as an example, in some particular areas of the world. And now there's a community that can bank, that maybe couldn't bank before, and now that they can bank, there's a whole new era of people that can build for their community and do things for the world. Like, those are the types of things that motivate me towards value.

When I think of some of our, even shining bright things that we do—and I call them everyday things, there are many of our customers that depend on us to operate for many of the things that each of us experience every day... So, we are really working with customers to turn on the lights for the world by using our solutions. And so, while there are certainly technical components of the work that we do, we are a technology company, but when I get to that value, that value is not just installing the solution, but it's understanding why we're installing that solution so that that company can get to the heart of why they exist.

Hanish Patel:

So I want to use that as a backdrop, and pivot to you, Marybeth. Customer-centricity is something that's been around for a while. It's not a new idea, or concept, or initiative by any measure. I'd love it if you could give our listeners just a bit more of a walkthrough as well, now that we've had it defined by Toya, just how you've seen that evolve over the years?

Marybeth D'Souza:

Yeah. It's been fascinating when I think back on the past, you know, decade-plus of how customer-centricity, especially in a B2B technology or software space, has evolved. Those of us who have been thinking about this and doing this work for a while, we've always believed that having an eye on how a customer adopts your product and realizes value, will tee up opportunities for them to

continue to grow and ultimately stay with you. We've believed that for a while. But I would have to say, you know, in the last several years, a couple of things have evolved to make that increasingly more important. And really listen to some of the expectations that customers have for us.

And, really, successful companies are... they're not just one-product companies. They're companies that, as Toya mentioned... Like what they do at Cornerstone is they provide their customers with solutions and outcomes, and so therefore, your engagement with a customer never ends. You may have an activation or a deployment that needs to be successful, but the minute that's done and you've realized value, your customers are expecting you to deliver more on what they've already deployed, or deliver more use cases or solutions, to really expand the reach across the organization. And competition to do that's pretty high. So being at the forefront of proactively orchestrating the experience for your customers so that they are constantly realizing value, and they understand the value that they're looking for, is increasingly important in today's world.

We've seen a lot of that also, I think, change in the last couple of years as companies

have been under a lot of pressure around really looking at their spend and having efficient growth. And so, therefore, that means that for companies that are selling in to their customers, new customers or locals are harder to come by. And so that puts even more importance around your existing customers, and how are you retaining them and growing your existing customer base so that you can expand your reach?

So those are a couple of the key things that I've seen over the last couple of years that have really evolved and made customer-centricity and the ongoing proactive engagement with customers really important.

Hanish Patel:

So something you mentioned around spend: If we're thinking about that evolution, and companies thinking about spend, as an organization—and some way, particularly, if you're thinking about software-as-a-service type of company—as they're looking to maybe stand up or actually invest in customer success as a core function within their organization, do you believe it can be a leading differentiator for them compared to their competitors in the way that they approach it and focus, as a core, for what they're doing in customer success?

Marybeth D'Souza:

Absolutely. I think this is where the value conversation comes in. Because if you're only looking at spend, that's only a piece [laughs] of the puzzle in how people are making decisions. But companies who excel at customer success are doing a few things different from their competitors, and one of them is on how they define value. And they define value on a couple of different areas, which would include not only the performance of their products—like, delivering what I told you that I would—but also what's the experience that you have with me as a customer?, and what is the business value and the business outcome that I am helping you realize.

And so, the definition of value really needs to cover those three things. And then in order to make sure that that's visible, companies who excel at customer success are also engaging customers in that conversation. And so they are making that value visible, they're engaging with the [laughs] customer around what it takes to realize that value, and, in some cases, putting that responsibility on the customer as well, so that there's mutual commitment and accountability to realizing that value.



And so when we get into conversations around spend, it should shift to value. The definition of value needs to be met from a company, or business, perspective and have a clear understanding of what's really important.

Hanish Patel:

As you mentioned about value, and Toya, you mentioned earlier... [I want to get] your thoughts on it as well, from that differentiator perspective.

Toya Del Valle:

It's absolutely a differentiator. Aligning very much to Marybeth, if we don't know where we're headed, then where are we headed? And I think that's when we're like, "Are we successful? Yes or no." We have to understand what we're driving towards, and those are the areas where customer success teams can come in and really strongly engage as a partner to determine what's that journey, how are we going to get there? When there's a way that we don't know how we're going to get there, how are we going to solve that together?

But that is just really paramount; otherwise, you're not going to reach anyone's goals, you're sometimes going to be doing things. And no person, no company is successful at just doing things, because you're not guiding yourself or guiding your organization to any type of journey.

And where customer success teams really come into play is that we are really looking at the journey. And the journey, it changes. It updates. I think about how we were engaging customers before the pandemic, and then some of the changes that we had to make—some of the shifts we had to make into organizational priorities, at the heart of the pandemic. And that, now, at this phase, where some organizations, individuals are coming back into office, some are staying remote, some having different components of hybrid—how do we engage them with learning? How do we engage them with talent and the new way of working? Those are ways that we

are continuing to evaluate the journey, determine what organizations need, and it shifts.

So that's why we really come together to really determine what is that strategically, but where does that change? And then how do we work those changes with you, so you can continue to define success even in an unknown or changing world, as we are constantly in? And we should expect that.

Hanish Patel:

So how do you then, in some way, evaluate the most impactful initiatives to drive customer-centricity versus—as you put it—just doing things?

Toya Del Valle:

I'll take it high-level organizational, and then I'll bring it back into our customer success team. Customer success and customer-centricity are organizational initiatives. They are not just a team. And that team is important. And so the entire company, which Cornerstone is, has to be focused on customer-centricity, and then there are different individuals that are stewards of different parts of that journey.

And so, within the customer success team—and I'll call out a customer success manager—that's an individual that really is sitting and engaging with customers to walk them through their journey, determine what they need. But then there's also teams that we have within our professional services team. So it's determining that, wow, we have a solution... You have to make sure that that solution works within your organization and it matches your needs technically, or you're never going to get to that value, if you can't use it.

If it's implemented and no one's using it because we haven't built that right adoption, you're also not going to get to your needs. So while you have that strategic value component, there are additional ways of engaging individuals within organizations to ensure that the solutions are working the way that you expect them to. And as

organizations have different teams and divisions within those organizations, how flexible and agile are we at the same time?

Hanish Patel:

Got it. So then as we think about these customer success strategies, can you tell us a little bit more about a community you're building for the customers?

Toya Del Valle:

Sure. So we're on a journey to build a new customer community at Cornerstone, and we have been privileged to have several companies join us through acquisitions that we have had. And the benefit in that is that we've brought together a lot of new individuals, new team members, new solutions for our customers... New customers for the solutions that we have. But if you can imagine, all of this came through on different platforms.

So what we are doing is building a new community, so we can bring all of our customers together so that they can learn from us and they can learn from each other. So we are going to have training courses there, where as much as you like—some people like to talk to humans, some people like to do a lot of self-service, and I like a little bit of both. But you can go to these to this community, and you can determine, "Hey, what's a course do I need? What's just-in-time training that I may need to learn something new or to upskill on something that I need to learn more about? Let me determine what a workshop that works best for me and my company, and something that I need to solution to."

Also, from a certification standpoint, if I'm an individual that I want to be a superuser or a power user in a particular area of the solution so that I can drive more value within my organization, then I want to be able to do that.

At the same time, we're having observation sessions and just real, live applications, where there are live webinars, there's recorded webinars, to come in and engage

with other individuals to grab best practices from one company to another. While we at Cornerstone believe that we have a lot to share and a lot of tools and initiatives, we all find in that peer-to-peer connection, this company to this company, this leader to this leader—there's great ideas that are generated there, and that's an opportunity for folks to come together also. It's really a place where you can come together, you can learn what you need to learn, you can access different components of Cornerstone, and you can have a route to ensure that you are getting your needs met.

That is certainly an online solution, but there are drivers in that to communities and individuals as well. And I don't know about y'all, but for me, I like a little bit of self-service... and then when I need to come out of that and I need to grab a human to engage with as a peer, or learn more, I'm able to do that as well.

Hanish Patel:

I love that. And like you mentioned around the individual preference of whether you are call it "handheld" all the way through, or self-service, or some kind of mix of that. With that, Marybeth, I wonder if I could get perspective from you in terms of some of the clients that you've helped along that journey, what you're seeing across that spectrum? Or is it very much personalized to that individual, as opposed to a blanket approach, based on the type of service that's going to be provided to the customer?

Marybeth D'Souza:

Yeah, it's complicated. It's exactly as Toya described, where providing multiple different channels, multiple different ways to engage with a company, is needed, because we need to meet the customers where they are. But also, I guess, in an integrated way.

And so when I say integration, I mean a couple of different things. One is integrated from an organizational standpoint. I mean, the number-one thing a company should do is not expose their org structure and their org chart to their customers, right? So it

needs to appear integrated and coordinated across the entire customer journey, and that includes teams that are customer-facing, like a marketing, or sales, or customer success and post-sales team.

But the level of integration, it is really critical from an organizational standpoint to then have that unified, holistic view with the customer across their entire journey, through all those different channels, whether it's self-service, or human touch. It's pretty complicated but possible to execute on that strategy.

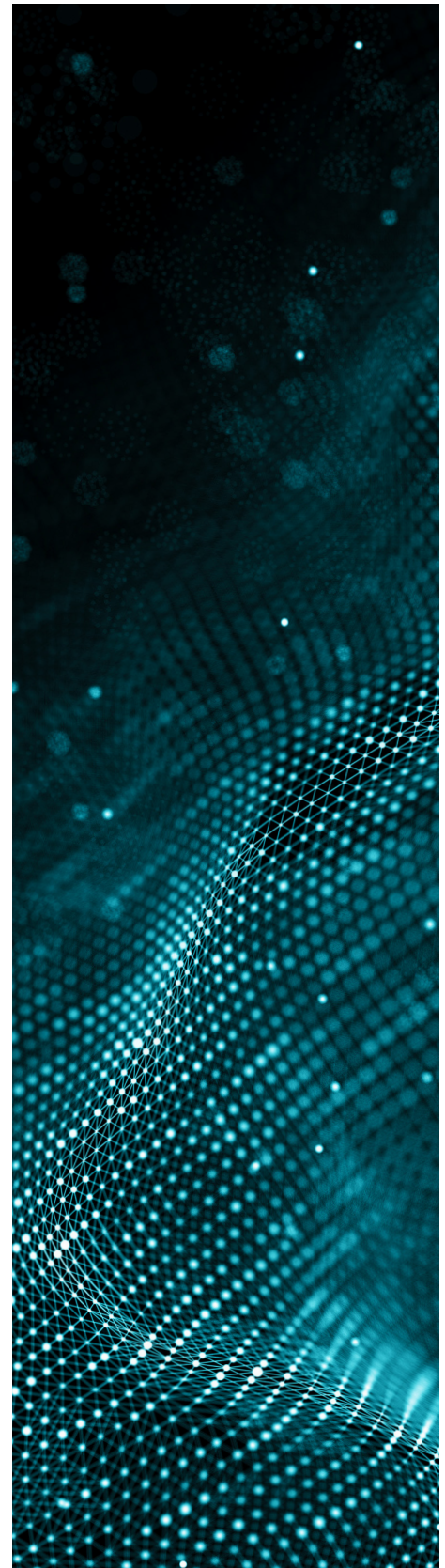
Hanish Patel:

If you think about how the both of you have defined customer-centricity, the customer success, where its initiatives and impact across an organization and how an organization can set itself up to have that as a focus, have that as a differentiator, really looking at value, and not just the spend. I want to ask if I could get both of you to get your crystal ball out and think about where you see the future of customer success? And particularly, how is that space going to change over the next few years, knowing that, as we all know, the lands are always shifting for the way that consumers want their preferences, the way that they want to engage with companies, with enterprises? What are your thoughts on what that future looks like?

Toya Del Valle:

I am certain that the future of success is going to be different. And when I mean different, I mean it is going to continue to evolve to higher and higher levels of strategic engagement and strategic activities and thoughts.

When we talk about AI and the growth of that, there are some more day-to-day things that I do think will be replaced, but things that will not be replaced is understanding business goals, understanding human behavior, you know, coming together to solution, and to really drive towards what success looks like. Those things—I don't believe those things are ever going to change.



I do believe that we're going to have tools that are going to allow us to come out of some of the more day-to-day tactical things, so we're spending most of our space on really driving high orders of needs, because the world is going to—in my view—continue to be more diverse, more complex, and it's going to continue to be diversified in a way that's pretty amazing. But it's also going to prove to us that nothing is going to be the same. No humans are going to be the same, and there's going to be more diverse needs that will need to be met by companies and organizations so that we can solve for the humans that depend on us.

So customer success is going to continuously be important, and even more so important just to drive that higher order of thinking, but we'll probably move away from some more of the tactical components, because I believe other humans will design solutions to solve for those.

Hanish Patel:

That's great.

Marybeth D'Souza:

I love how you highlighted that, Toya. When I think about the future of customer success, I see that the companies they're engaging with are going to provide them with best practices and proactively guide them along their journey, so that they get the value. I think that that's going to continue, and if anything, it's going to be heightened.

So the question is, how are companies responding to that? And a couple of things I'd highlight: One is I think customer success is a business imperative that every C-suite is going to have a chief customer officer, like Toya described her role, and this is a topic at the board level. I think the rise of AI and expectations that are coming with that—of companies being able to personalize and target how they engage with their customers—is going to also increase expectations, and it's going to change the way we think about engaging with our customers in some ways that, you know, I think are pretty exciting.

And then the last thing I'll put out there as kind of a charge for the future of customer success is when we think about some of the points that we've talked about around the level of integration or the diversity in customers, or geographies, or industries that this part of the organization is working with, I believe that there's a huge opportunity for customer success to be the most diverse and inclusive place for people to make a career or spend time in their career. Because it does value and recognize so many different skill sets and experiences and perspectives that will meet the customer expectations—or even delight them beyond their customer expectations.

So I think there's a huge opportunity in how customer success will continue to drive value for the customers—and beneficial for companies as they're continuing to grow.

Hanish Patel:

I really appreciate that perspective from the both of you, in terms of where it is evolving and where it could go. And I'm really excited to hear about what the opportunity that lays forward to drive value for the customers and, as you put it, Toya, really drive that higher order of thinking as well as, Marybeth, you talked about—it's a board imperative. That it's at the core of every enterprise and company as they think about going forward.

And I'm sure our listeners have taken away how to really kind of elevate the importance of customer experience, to make sure it's at the heart of their business, that's truly driving value for their customers.

So I really want to thank the both of you, Toya and Marybeth, for coming on the pod and joining me today to really have an informative discussion around customer success strategies and how to really drive that loyalty, satisfaction with centricity, as that focus for an organization.

And to all our listeners, until next time, happy listening.

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