

# The Future CCO

Advice For Those on the Path to  
the Chief Customer Officer



**CHURNZERO**



# The Future CCO:

## Advice for those on the path to the Chief Customer Officer

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At leading-edge companies across the globe, the customer now has a new champion for them sitting on the leadership team. This newly developed position is the Chief Customer Officer (CCO). A CCO is an executive in the C-Suite that is responsible for leading a customer-centric approach across departments to deliver the best customer experience throughout all points of the customer lifecycle.

The goals of a successful Chief Customer Officer are to:

- **Own the revenue number for the installed customer base.** The CCO is responsible for all customer activities with the goal of generating revenue growth for the company.
- **Build a profitable customer experience.** To help drive recurring growth the CCO must focus on initiatives such a customer prioritization, customer retention, customer loyalty, customer satisfaction, as well as improving the customer experience.
- **Create a customer-centric culture.** One of the most important roles of the CCO is to help create a strong, customer-centric culture company-wide with accountability and ownership of the customer experience at all levels.
- **Drive Change.** This role was created for a reason, to bring about change within organizations. It is going to be up to the CCO to effectively communicate the need for a business or process change and lead the way to embarking on a new path.

The CCOs of the future are Customer Success Managers (CSMs) today. With that in mind, we wanted to help provide a more defined and clear path for you on your journey to understanding the customer better and becoming a future Chief Customer Officer.

We reached out to industry leaders to get their advice on what it takes to become a Chief Customer Officer, to help guide you on your career path.

In this eBook you will find advice on the following:

- 1 What are the personality traits that can be and must be learned to be a CCO?
- 2 What skills must a future CCO invest in on his/her path to a CCO?
- 3 Is there a must have degree on the future CCO's resume?
- 4 What are one or two unintuitive or unexpected tips for future CCOs?
- 5 What technology stack should a future CCO become familiar with along the way?
- 6 What responsibilities will fall on CCOs in the future?



# What are the personality traits that can be and must be learned to be a CCO?

“ You have to be able to deliver and articulate a ROI in the work. You need to be able to unite the C-suite. In most cases, you need to have run an operation of the business successfully and have shown customer-centric approaches. You also need to be able to check your ego at the door, because this role is about making other people successful. ”

– *Jeanne Bliss, Author, Chief Customer Officer 2.0 President, CustomerBliss.com*

“ The future CCO needs to be part strategist and part customer service manager. You have to think like your customer and walk in their shoes, but also have the creativity to fill in the blanks where they may not be able to provide input. ”

– *Bob Clary, Director of Marketing, DevelopIntelligence*

“ A CCO needs to be a creative, flexible and pragmatic visionary problem solver. They need to have a high emotional EQ in order to empathize with customers while balancing the needs of the company and employees that the CCO serves. They need to be agile in their business approach to protect against disruption and continue evolving their organization's customer experience. ”

– *Kia Puhm, Partner, KIA CX*

“ **Personable** - Meaning they need to be someone that people can trust.

**Caring** - They need to care about the people that work for them and with them. If they care for their employees, the employees will respect them and listen to what they have to say.

**Understanding** - They need to remember that everyone and every situation is different.

**Helpful** - They need to be willing to get in the trenches with people. They need to be willing to do the work themselves. The employees will see him/her working and helping solve any problems or issues that may come up. ”

– *Ian Reynolds, Partner, Zibtek, LLC*

“ First and foremost an individual must possess a customer service focus. Regardless of level in the Customer Success organization, individual contributor or CCO, you must be focused on service to be successful. There is no faking it. ”

– *David Verhaag, VP Client Experience, Degreed*



“ A CCO must be calm and thoughtful. A CCO must be open minded and willing to learn and listen. In order to be successful at training the team, the CCO has to understand the customer mindset and needs. He/she must represent the customer to the company in a way that helps the company best solve for customer needs and satisfaction. The CCO must be in a position to negotiate and effectuate change without being overbearing. ”

*- Deborah Sweeney, CEO, MyCorporation.com*

“ Flexibility, business acumen and empathy all are vital traits to any CCO. Flexibility is needed because it takes a while to determine what the right combination of metrics, feedback mechanisms, and business activities combine to create the best experience for customers. The best leaders are flexible enough to recognize when something needs to change mid-stream. Knowing HOW the experience for customers – good or bad – impacts the bottom line of the business is key to continued success of it. Too many leaders don't see this connection until it's too late. And empathy seems like a no-brainer for customer leaders, but empathy is necessary in all kinds of ways. Leaders must understand the customer journey from their customer's perspective, and marry that with having empathy for what customer service agents and front-line workers have to deal with on a daily basis. Processes and systems often make things more difficult for these workers, so understanding each part of the experience and showing empathy for all involved is the only way to make improvements along the way. ”

*- Jeannie Walters, CEO, 360Connex*



## ChurnZero CEO to Future CCO

“ A great CCO has traits that should not belong in the same person. They need to be empathic to the customers' needs yet be a challenger to get customers to move down a path of success. They need to get joy in solving customer problems like a support person but love to ruthlessly go for the close to upsell and cross sell. These types of contradictory traits truly show up in a small percentage of people, so it is unlikely that it will come naturally to you. The onus is on you to make it natural. ”

*- You Mon Tsang, CEO & Founder, ChurnZero*



## What skills must a future CCO invest in on his/her path to a CCO?

### “ 5 Competencies of a CCO:

- 1 Creating a success metric around elevating customers as assets
- 2 Aligning around experience to frame and focus the organization on the customer journey
- 3 Building a customer listening engine to drive change
- 4 Delivering proactive customer driven experiences
- 5 Being a cultural leader to improve customers' and employees' lives ”

*– Jeanne Bliss, Author,  
Chief Customer Officer 2.0  
President, CustomerBliss.com*

- “
- **Customer / Professional Services / Support** (serving customers)
  - **Sales / Account Management** (owning & driving revenue)
  - **Marketing / Communications** (positioning & messaging to existing customer base)
  - **Operations Understanding / Experience** (understanding systems & how to effectively use them to drive efficiency and scale)
  - **Data Science / Big Data / AI Understanding** (how to use customer context & data to drive relevant, value-add, differentiated experiences) ”

*– Kia Puhm, Partner, KIA CX*

“ The skills on the path to becoming a CCO fall within leadership and management skills. The CCO candidate needs to have run a group and to successfully demonstrate a strong aptitude for listening to and engaging others. The candidate needs to have a good EQ and also an ability to assess numbers. There needs to be an ability for the CCO to understand the ROI of the role – how is focusing on the customer positively impacting company growth and return. The CCO needs to have a combination of people skills matched with an analytical ability to understand the impact the role is having on the overall company. ”

*– Deborah Sweeney, CEO, MyCorporation.com*

“ The skills a CCO must invest in on his/her path to the CCO include communication skills, negotiation skills, leadership and team development. Regardless of how polished a CCO is, building and continuing to refine communication and leadership skills are essential to deal with the challenges of the role and to empower the Customer Success teams in what can often be a tough job. ”

*– David Verhaag, VP Client Experience, Degreed*



“ **Vision** – They must have the ability to see the vision or growth of where to take the company. Thus, will allow him/her to know when they are moving in the right direction.

**Teacher** – Meaning teach those they are over to be successful. Like the old proverb says, “Give a man a fish, and you feed him for a day. Teach a man to fish, and you feed him for a lifetime.” In this case, teaching the team to fish allows them to grow and drive quality and success for the clients/customers.

**Problem Solving** – There will always be some sort of problem. A great CCO will know how to help employees solve the problem for the customer or client. The important thing here is to make sure the CCO doesn't just do it for the employee. He/she helps people grow by making them work for answers.

**Communication** – He/she needs to be willing to have both good and bad conversations.

**People Skills** – Being able to reach people and their emotions. This will help to know when a client is happy with the progress or if additional support is needed.

**Drive for Quality** – They understand that quality is what keeps the train moving. Delivering a great product to the clients/customers is what will continue to increase work. ”

– Ian Reynolds, Partner, Zibtek, LLC

“ There are key disciplines to learn around leading the customer success efforts at any organization. One great way to learn is by studying for the CCXP (Certified Customer Experience Professional) exam and then gaining the certification. This is the only certification focused on all aspects of the role – not just one metric or software – and is run by the Customer Experience Professionals Association (CXPA) which is a non-profit focused on the advancement of customer experience professionals.

It's simply not enough to understand one approach like Net Promoter Score (NPS) or Customer Effort Score (CES), although it is critical to understand these approaches within the context of a larger strategy. Finding mentors both in and outside your industry can help you see beyond the limits of your own organization's systems, processes or antiquated rules! ”

– Jeannie Walters, CEO, 360Connex



## ChurnZero CEO to Future CCO

“ There is good advice here on the skills needed. To try and get these skills, I would - do tours in the departments that will fit under the CCO umbrella – Customer Success, Account Sales Management, Support, Implementation, and Services. Push your comfort level specifically to get experience in the department that fits your traits the least. ”

– You Mon Tsang, CEO & Founder, ChurnZero



## Is there a must-have degree on a future CCO's resume?

“ I am partial to STEM (science, technology, engineering, and mathematics) degrees as they have the ability to use the combination of diverse skill sets to determine a holistic customer-centric framework that uses data and customer context to drive differentiated customer experiences in the most efficient operational manner.

I believe women in STEM are well poised for success in this role offering the combination of left and right brain skills mix to address the technical and empathetic sides of the equation. ”

– *Kia Puhm, Partner, KIA CX*

“ Not necessarily. I feel that a CCO's knowledge and strength comes from experience and their own personality. Having a degree in either business or interpersonal relationships or something similar would be great though. ”

– *Ian Reynolds, Partner, Zibtek, LLC*

“ I am a believer in education, but I do not believe that any one degree sets a CCO up for success directly. Certainly, an aptitude to grow and learn is critical. So, if the applicant has gone to business school or obtained a law degree, it may not matter. If the candidate is open to learning and has accepted (and excelled) in positions that show strong management skills combined with an understanding of business and ROI, that will be sufficient. While it is not always the case, I find that a focus on education shows a desire to grow and improve (it can also show that someone doesn't want to enter the workforce, so you have to be careful). BUT, education helps people think more broadly. It is not a specific degree that makes the difference, but rather an overall sense of willingness to learn and grow and to get to know the business, the customers and management. Often times, it's more about work ethic and engagement than simply a degree. ”

– *Deborah Sweeney, CEO, MyCorporation.com*

“ There is no must have degree for future CCOs. More important than a specific educational background is front line experience in customer service roles, specifically the role of Customer Success Manager in SaaS companies. Experience in Professional Services and Support organizations can be helpful, but the role of Customer Success Manager is unique and one of the best ways to develop the experience required to be successful as a CCO. ”

– *David Verhaag, VP Client Experience, Degreed*



“ There are some progressive institutions creating degrees around customer experience, but they are not very prevalent yet. Right now, I’m witnessing how marketing leaders are being asked to play the role of CCO and vice versa. I think marketing and business degrees both can produce great CCO’s but it’s up to the leader to invest in their own well-rounded education. ”

– Jeannie Walters, CEO, 360Connex



## ChurnZero CEO to Future CCO

“ I would not advocate for any one particular degree, but I am a fan of a broad liberal arts education. The best C-suite executive is a learner and problem solver across many disciplines. You’ll want to be mindful not to over-index on any one area in your studies and continuing education. ”

– You Mon Tsang, CEO & Founder, ChurnZero



## 4 What are one or two unintuitive or unexpected tips for future CCOs?

“ Most CCOs I interview on my Chief Customer Officer podcast say they wish they would have done these three things 1) started communicating across the organization earlier 2) included employee strategy earlier 3) united the c-suite earlier.

CCO's may jump immediately to fixing problems. Then you become the whack-a-mole person, you are looked at as a break-fix person verses changing culture and changing how leaders lead and uniting the c-suite as a unit of people who will work together. You don't want to be looked at as a service provider to the C-suite but rather a partner in helping the C-suite lead to a different kind of growth. ”

*- Jeanne Bliss, Author, Chief Customer Officer 2.0  
President, CustomerBliss.com*

“ Focus on the customer's business context, objectives and why they bought the product when developing the customer's product adoption journey, not on the product's value proposition in isolation. The latter is product-centric, focused on business application, the former is customer-centric, focused on strategic business outcomes. ”

*- Kia Puhm, Partner, KIA CX*

“ CCOs must be engaging. You have to be able to engage and learn from the customer, but also to engage and teach your team. The role is not just to represent the customer, but to translate your knowledge and understanding of the customer to the operational team to execute against solving for the best outcomes for the customer (and ultimately the company). Building rapport with customers and team members and getting the company to think differently requires an engaging, savvy approach to life and business. This personality trait may not always be present in leaders. Some leaders are problem solvers, some are numbers people, but being someone who can listen and get others to take action is a skill and having that type of engaging personality is priceless. ”

*- Deborah Sweeney, CEO, MyCorporation.com*

“ Future CCO's will have to invest in innovation and understand how to lead innovation in their organizations. The best customer experiences will lead with innovation, and the more connected a customer leader can be to that, the better. ”

*- Jeannie Walters, CEO, 360Connex*



“One unintuitive or unexpected tip for future Chief Customer Officers is to embrace creativity and failure. Simply executing a solid customer experience is no longer enough to retain fickle customers with a lot of options. CCOs will need to embrace creativity and challenging new ideas, including the occasional failed ideas, to produce not just good results for customers but surprise and delight in the experience. ”

– David Verhaag, VP Client Experience, Degreed

“Take time to really know the people that work for you. Take time to know each client and customer. Having this knowledge will help employees gain confidence in you and what you are all about. Also, don't be afraid to ask questions. ”

– Ian Reynolds, Partner, Zibtek, LLC



## ChurnZero CEO to Future CCO

“Carry a new sales quota. This will help you understand how customers are sold to and give you appreciation of the challenge of new sales. You will have sympathy for your future Chief Sales Officer and you will respect each other more. ”

– You Mon Tsang, CEO & Founder, ChurnZero

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## What technology stack should a future CCO become familiar with along the way?

“ CCO's should understand what tools will support the most effective analysis of customer context and data for proactive customer relationship management, as well as tools that assist the organization to effectively support those key customer interactions and automate those that differentiate the experience by making it easier for the customer to do business with the vendor. AI platforms are becoming increasingly more important within the CCO's arsenal of technology. ”

- *Kia Puhm, Partner, KIA CX*

“ CCOs should be familiar with Salesforce or similar CRM functionality to understand in some depth the sales, contracting and renewal processes. It is increasingly important they understand Customer Success software. Finally, they should be familiar with reporting platforms to support the team with data to back decision making. ”

- *David Verhaag, VP Client Experience, Degreed*

“ CCO's will need to be familiar with CRM systems, feedback metric systems, customer sentiment, and more. ”

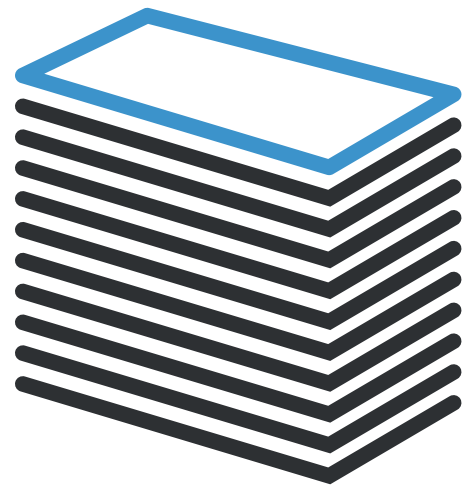
- *Jeannie Walters, CEO, 360Connex*

“ Stacks are constantly in flux so just learn as much as you can. ”

- *Ian Reynolds, Partner, Zibtek, LLC*

“ Understanding Salesforce or similar systems may be a great asset, but overall, an ability to learn company-specific systems is critical. The underlying technology of each company may vary immensely, and some may use Salesforce or similar customer management software as a piece of their business, but truly every business is going to be different, so having an ability to understand the nuances of the technology is critical. ”

- *Deborah Sweeney, CEO, MyCorporation.com*



### ChurnZero CEO to Future CCO

“ Technology will not stop changing and nor should your command of the latest tools and platforms that are made available to you. Firms like ChurnZero are investing in modern systems that are tailored for Customer Success teams. We think it's a game changer, of course. Feel free to reach out. ”

- *You Mon Tsang, CEO & Founder, ChurnZero*



## What responsibility will fall on CCO's in the future?

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“ An interesting trend is what we call the hybrid CCO. More and more CMOs are also going to be the CCO. They are going to blend marketing and the transformation work. We also see many of them that run operational areas and in addition lead the transformation. This is a welcome evolution of the CCO that will become more prevalent. ”

*- Jeanne Bliss, Author, Chief Customer Officer 2.0  
President, CustomerBliss.com*

“ Quality Assurance – it can't be overstated and will never go away. ”

*- Ian Reynolds, Partner, Zibtek, LLC*

“ CCO's will be asked to participate more on the pre-sale experience (awareness to purchase, including marketing) and the experience design of the future. ”

*- Jeannie Walters, CEO, 360Connex*

“ As serving customers with exceptional and seamless experiences becomes the “table stakes” norm, the CCO will need to continue understanding the customer context and data to predict experiences, products and services that customers don't know they currently want.

Where once this was typically the purview of visionary CEO's and entrepreneurs, I believe it will become the norm for CCO responsibility to include driving solutions that fundamentally changes how the world operates. ”

*- Kia Puhm, Partner, K!A CX*

“ CCOs will have the responsibility of the VOC (“voice of customer”) and VOE (“voice of employee”). How is the company engaging with and growing the customer base? How are the employees and how are they executing on the initiatives of putting the customer first? ”

*- Deborah Sweeney, CEO, MyCorporation.com*

“ I think the role of CCO will continue to evolve and will include direct responsibility for customer marketing. This is often a dotted line function today but as the role of CMO and CCO continue to evolve I see the Chief Customer Officer taking more direct ownership of customer marketing and messaging. ”

*- David Verhaag, VP Client Experience, Degreed*

### ChurnZero CEO to Future CCO

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“ The CCO will be asked to produce much of the growth and/or profit for an organization. All companies, even ones focused on growth, understand the impact of keeping and expanding customers. Over and over, the CCO will be asked to save the quarter by delivering solid results. Are you ready? ”

*- You Mon Tsang, CEO & Founder, ChurnZero*

# About the Contributors

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**Jeanne Bliss**  
Author, Chief Customer Officer 2.0  
President, [CustomerBliss.com](#)

Jeanne Bliss pioneered the role of the Chief Customer Officer, holding the first ever CCO role for over 20 years at Lands' End, Microsoft, Coldwell Banker and Allstate Corporations. Reporting to each company's CEO, she moved the customer to the strategic agenda, creating transformational changes to each brands' customer experience. She has driven achievement of 95 percent loyalty rates, improving customer experiences across 50,000-person organizations. She is now the President of [CustomerBliss](#), where she guides the C-Suite and Chief Customer Officers around the world on earning business growth by improving customers' lives. Her clients include: AAA, Johnson & Johnson, Brooks Brothers, Bombardier Aerospace, and Kaiser Permanente. She is a sought-after speaker and thought-leader, the author of [three best-selling books](#), and co-founder of the [Customer Experience Professionals](#)



**Kia Puhm**  
Partner, [K!A CX](#)

[Kia Puhm](#) is an entrepreneurial executive with 21 years of experience leading strategic corporate initiatives. She has held chief positions in customer success, services, account management and support at companies such as: Oracle, Eloqua, Day Software (Adobe), Intelix Technologies, and Blueprint Software Systems.

Kia has pioneered the art of Customer Experience by leading businesses through the transition to customer-centric organizations. Her methodology provides clients with a disciplined and sustainable approach to increasing customer lifetime value & loyalty.



**David Verhaag**  
VP Client Experience, [Degreed](#)

David is the VP of Client Experience at [Degreed](#), the lifelong learning platform. Previously he was VP Customer Success at Kahuna and HireVue, Sequoia based startup and Director Customer Value at SuccessFactors where he helped to start the Customer Success function.



**Bob Clary**  
Director of Marketing,  
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Bob is the Director of Marketing at [DevelopIntelligence](#), a software training company based out of Boulder, Colorado. Bob is a brand strategist, blogger, and social media guru with specialties that also include search engine optimization, search engine marketing, re-marketing, digital public relations and marketing engagement.



**Deborah Sweeney**  
CEO, [MyCorporation.com](#)

Deborah Sweeney is the CEO of [MyCorporation.com](#). [MyCorporation](#) is a leader in online legal filing services for entrepreneurs and businesses, providing start-up bundles that include corporation and LLC formation, registered agent, DBA, and trademark & copyright filing services. [MyCorporation](#) does all the work, making the business formation and maintenance quick and painless, so business owners can focus on what they do best.

# About the Contributors

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**Ian Reynolds**  
Partner, Zibtek, LLC

Ian J.H. Reynolds is a Partner at **Zibtek** with deep Transactional Finance and Enterprise Software experience. Recent years include roles in corporate finance and technical software, with representative “hands-on” experience across the entire Energy industry spectrum including upstream, midstream, downstream and wholesale and retail energy trading and marketing. Ian has participated in \$15 billion dollars in Transaction Advisory, Restructuring and Mergers and Acquisitions. Ian has worked as a Consultant at Opportune, LLP and developed broad experience in financial planning and analysis, complex financial modeling, turnaround and restructuring activities and process and strategic planning.

Outside of strategy and finance Ian has worked in enterprise level software delivering large, complex, multi-site global ERP implementations involving process re-engineering, systems integration and application implementation spanning multiple countries and cultures. His focus areas have been in the development, support, architecture, design and implementation of financial solutions including system integration and reporting tools. He has been involved in multiple full life cycle system implementations and upgrades from assessment and planning to implementation and production support.



**You Mon Tsang**  
Founder & CEO, ChurnZero

You Mon is the founder and CEO of **ChurnZero**, which helps subscription businesses fight churn with a real-time customer success platform. Before ChurnZero, he was the CMO of Vocus (now Cision) and CEO of its marketing automation business unit, OutMarket. He is a serial entrepreneur, having founded four software companies, including ChurnZero, Biz360, and Engine140.



**Jeannie Walters**  
CEO, 360Connex

Jeannie Walters is the Chief Customer Experience Investigator™ and founder of **360Connex**, a global consulting firm specializing in evaluating and improving the customer journey. Jeannie is a Certified Customer Experience Professional (CCXP,) a CX Expert panel member for the Customer Experience Professionals Association, a Professional Member of the National Speakers Association, and a TEDx speaker. She also co-hosts a top-rated podcast on customer experience and customer service, Crack the Customer Code.

She's passionate about making the everyday interactions we all have as customers better and writes, speaks, studies and trains on customer experience and patient experience issues around the world. Her mission is "To Create Fewer Ruined Days for Customers."

## About ChurnZero

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ChurnZero is a real-time Customer Success Platform that helps subscription businesses fight customer churn. For more information on how we can help you expand your current accounts, increase product adoption and optimize the customer experience, please visit us at [www.churnzero.net](http://www.churnzero.net) or **contact us at (703)721-4988**.