Datto Transforms Sales Support Function Into A New and Improved Partner Success Team with Valuize

"I'm so impressed by every single person I interacted with at Valuize, from the team members all the way up to the executives. They're a solid team that delivers amazing client service."

- Alana D'Angelica, Head of Global Success Transformation & Operations, Datto

EXECUTIVE SUMMARY

Interviewee: Alana D'Angelica, Head of Global Success Transformation & Operations, Datto

Company: Datto
Industry: IT and cybersecurity
Employees: 1,700
Website: www.datto.com

Challenge: Building scale with inconsistent, manual processes in a rapid growth environment

Valuize services
- ❖ Customer Data Modelling
- ❖ Customer Success Process Engineering
- ❖ Gainsight Implementation

Results
- ❖ 5 months to complete phase 1 and 2 of Datto's Gainsight implementation
- ❖ 100% user adoption of Gainsight
- ❖ 50 standardized process playbooks created and rolled out across 5 teams

INTRODUCTION

Reimagining Customer Success

Datto is a leading provider of cloud-based software and technology solutions delivered by managed service providers (MSPs). Datto believes that there is no limit to what small and medium businesses can achieve with the right technology. Empowering the world's fastest growing MSPs and SMBs, Datto offers Unified Continuity, Networking, and Business Management solutions and has created a one-of-a-kind ecosystem of MSP partners. These partners provide Datto solutions to over one million businesses across the globe.

Datto was founded in 2007, and when it merged with Autotask in late 2017, the organization nearly doubled in size. Since then, the work environment has been extremely fast paced. Both Datto and Autotask had Success teams when the companies merged, but had different approaches to achieving success. Now, Datto is focused on building a unified Customer Success function, and hired Alana D'Angelica as head of the organization's Global Success Transformation & Operations team to lead the charge.

THE CHALLENGE

Rapid growth and inconsistent, manual processes

When Datto and Autotask merged, automation was low for the Customer Success team while manual administrative work was high. Due to the doubling in size of the Success team, inconsistent processes were also a challenge.

Datto knew it needed a customer success technology solution. The organization decided to adopt Gainsight, and chose to work with an implementation partner. Datto selected a partner, but hit an implementation roadblock along the way because Gainsight's customer success solution is typically used by SaaS companies. This posed a challenge, as not all of Datto's offerings are purely SaaS products - some lines also include on-prem components.

> "We wanted an implementation partner that could understand that our business is a bit unique compared to other companies with traditional Customer Success teams using Gainsight," said Alana D'Angelica, Head of Global Success Transformation & Operations.

D'Angelica began to search for a partner to help make Datto's Gainsight implementation project a success.

FINDING A PARTNER

A knowledgeable, agile partner

Datto chose Valuize to lead its Gainsight adoption project after D'Angelica connected with a Valuize team member on LinkedIn. D'Angelica was impressed by Valuize's extensive knowledge of the Gainsight product and the team's specialized consulting expertise with customer success strategy and operations.

Valuize had also worked with many companies that have a split on-prem/SaaS model, and - because of this - recognized that Datto's operational needs were different from a pure SaaS company.

During the Gainsight implementation, Datto's Onboarding, Post-Onboarding and Incident Management teams all had different requirements. Valuize demonstrated its ability to meet their respective needs. In addition, Valuize was ready and willing to work fast to meet Datto's timeline to design and configure a demo Gainsight system in less than 1 month for the company's sales kick-off.

THE SOLUTION

Implementing standardization and automation

Datto purchased Valuize's Customer Data Modelling, Customer Success Process Engineering and Gainsight Implementation services.

As part of the Data Modelling service, Valuize worked with Datto to identify which of its myriad systems should move into Gainsight, and which were a lower priority and/or so complex that it would be burdensome to transition them to the new solution. With advice from Valuize, Datto's Business Intelligence and Data team determined the best way to integrate the systems into Gainsight, then set up the structures to migrate the necessary data.

> "The Valuize team really understood our data and had creative solutions. They connected with our data team to make the implementation work in the ways that we needed. It was a seamless experience," D'Angelica said.

Datto's Onboarding and Incident Management teams have process-oriented workflows that were built in Salesforce. Datto wanted to migrate them to Gainsight to centralize team activities. Valuize's Customer Success Process Engineering service enabled Datto to fit these processes into Gainsight's Success Plan and Playbook functionality. Now, Datto can seamlessly move processes into Gainsight, as Valuize provided extensive training to empower Datto's multiple teams.

Valuize delivered its Gainsight Implementation service as an agile, solutions-focused, organized experience that moved Datto along a roadmap to its desired end state. The implementation has empowered Datto to transform its Partner Success team from a reactive function into a forward-looking Customer Success team.

THE RESULTS
Widespread adoption and data driven success

5
MONTHS
PHASE 1+2

100%
USER ADOPTION
OF GAINSIGHT

50
PLAYBOOKS
DESIGNED

Gainsight has significantly improved day-to-day operations for the Success team as end users, which D'Angelica views as a result of the quality of the implementation.

> "I had never led the client side of a software implementation, and I wanted to work with consultants that had strong expertise. The Valuize team proved everything they demonstrated in our initial conversations," she said.

Within only a few weeks of implementation, 100% of Datto's Customer Success team began using Gainsight. This is particularly impressive considering that adoption of Customer Success technology is notoriously low within many

organizations. Companies even have to redo implementations if data requirements are not fully understood or customer success processes are not properly operationalized.

However, Datto had a solid Gainsight foundation thanks to its willingness to commit to data quality and comprehensive adoption—and thanks to Valuize's expertise in Customer Success strategy. Beyond Datto's Success team, the organization's Sales team has also benefited from Gainsight by gaining greater visibility into the platform's vast world of data.

> "I believe that partnership will become stronger, and the ability for the two teams to collaborate on accounts will be much easier than before," D'Angelica said. "As a result of this implementation, access to the right data has allowed us to prove our progress more than ever before."

LOOKING AHEAD
Shifting further towards a proactive approach

Adopting Gainsight marked a significant milestone in Datto's transformation. However, the company hasn't reached the end of its journey to proactive Customer Success quite yet.

D'Angelica's team will continue to improve processes to lessen manual administrative work, which will further enable Datto's Success team to leverage Gainsight to efficiently scale and drive a better customer experience.

Looking ahead, Datto plans to explore opportunities for automation available in Gainsight. Currently, most of Datto's partner outreach is one-to-one, and the organization is looking forward to using Gainsight's one-to-many email campaign tool later this year.

Ready to maximize the impact, efficiency, and scale of your customer success strategy + operations?

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