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The missing link between PLG and SLG



Miro's Dee Kapila on how scaled customer experience (CX) works

DEE KAPILA

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 Hi, it's [Kyle](#) and I'm back with a  edition of [Growth Unhinged](#), my newsletter that explores the unexpected behind the fastest-growing startups.

Most people pit sales-led growth (SLG) against product-led growth (PLG) like they're staunch high school rivals. But [Deepina \(Dee\) Kapila](#), global head of scaled customer experience (CX) at [Miro](#), knows this "either/or" mentality is short-sighted. That's why she figured out a way to blend SLG and PLG for the best of both worlds, and she's added some new pieces to plug some gaps.

The new approach is called "scaled CX" – and it's on the rise. It doesn't hurt that it allows Customer Success teams to stay lean while serving more and more customers.

Keep reading to go deep into scaled CX at Miro and how to apply it yourself. (This post may be too long for email; [read the full version here.](#))

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Sometime during the pandemic, I grew tired of all the ongoing debates in the SaaS industry about which framework was better – PLG or SLG. It just didn't matter to customers and it felt almost silly from a strategic perspective to be thinking within the limited construct of this binary.

So I started asking SaaS buyers exactly what they *did* care about. And I found out they felt extremely overwhelmed managing multiple vendors (most Enterprise organizations have hundreds of SaaS tools in their portfolio and we are just ONE of those), while figuring out how to integrate all of these into a seamless user experience and having only one way to engage with these vendors to get value from all of these tools (especially if that one way was always via a Zoom call with video ON, the standard).

What every single person I talked to said they wanted instead was something more seamless and elegant – a journey orchestrated just for them, vendors who felt like extensions of their team aka partners, and finally, CHOICE. Instead of jumping on a call, for instance, they wanted fast access to information when they needed it – or, better yet, be intuitively presented with that information at the **exact** moment they needed it.

Through these conversations it became clear that all of us in the SaaS world needed to stop paying attention to the PLG vs. SLG arguments. We needed to build something ELSE, something different. Something that brought the customer back to the center of it all.

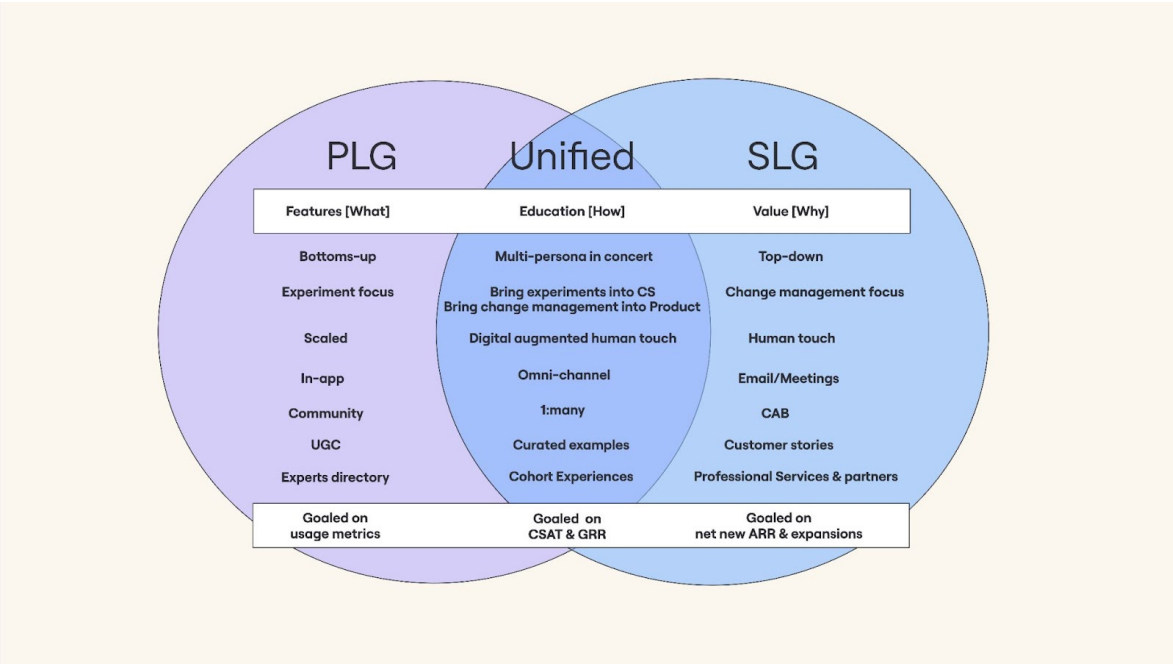
At Miro, we wanted our customer experience to be what customers actually needed to drive their desired outcome. For us, that meant starting by taking the best of both PLG and SLG worlds and then systematically assessing and plugging any gaps in the methodologies to reduce friction across the customer journey. We also needed to bring the CX department into the mix, as the role of CX isn't articulated very clearly, if at all, when looking at

standard industry interpretations of PLG and SLG. But CX absolutely has a role to play and I'd urge everyone to consider what role modern CS motions, paired with customer education, professional services and support functions can play in your organizations to serve customers and grow your business.

Here's what we did at Miro, and what worked for our hyper-collaborative culture.

Where to start

I started with an audit of typical SaaS PLG and SLG engagement ecosystems. I drew from my previous work at companies like Box and Visa, conducted market research and evaluated the current state of our CX offerings. That effort became this Venn diagram, which essentially showcases how PLG and SLG take customers through an engagement journey:



From "versus" to "and" – unifying PLG and SLG.

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How scaled CX at Miro works

Miro's mission with scaled CX is to engage, educate, equip and empower our users to do their jobs and achieve their business outcomes. We want to do that by unlocking value across every step of the customer journey through data-driven and automated on-demand, one:many content assets and experiences that are delivered at exactly the right time.

In the CX world there are functions that do this in bits and pieces – Customer Education as one example, Digital Success is another – these departments do work towards driving customer value and doing it at scale. However, they are usually separate, work on different parts of the customer journey (usually post-sales only, which is an antiquated practice if not an overall concept to say the least!), don't have dedicated in-house content production and tend to use numerous tech tools that are cumbersome to operate and tough to integrate into a seamless experience for end users. They also largely stay out of the core product. Sometimes, this is a function of companies not thinking strategically about CX functions, sometimes it's a function of the dogmatic PLG/SLG motions being historically exclusive of CX strategies and sometimes it's because neither of the aforementioned CX teams have historically had the skills to be able to develop in-app experiences alongside product teams, or partner more deeply with sales in the "pre-sales" process.

At Miro, we have brought together and tightly orchestrated Customer Education, Content Production, and Scaled/Digital Customer Success into one team: Scaled Customer Experience (SCE). We live in the CX org, but honestly we are never home! We are always couch surfing, and by that I mean that, by design, our team has to be hyper-collaborative. We work

super closely with various other CX teams, sales, marketing, product, analytics, operations, legal/compliance and business technology teams. This hyper-collaborative mindset is in Miro's DNA – our ops and analytics teammates are embedded within the teams they support, meaning they attend all the same meetings, participate in all our team rituals and we plan all our work together, setting shared goals. Our team has folks who are embedded in marketing planning rituals, etc...you get the picture. It's a truly cross-functional and united effort across all teams, something I think is pretty rare and special.

Here's what each of the SCE streams does:

- **Scaled customer education.** This team educates customers and users on all things Miro via 1:many and on-demand modalities.
- **Scaled content production.** This team produces high-quality, multimedia content that lives in Miro's in-app learning center, our academy, help center and other Miro surfaces.
- **Scaled/digital CS.** This team automates success milestones across the customer journey, setting the foundation for all CS segments.

We set up a scaled success program for a few reasons. We knew customers wanted optionality and we knew that 1:1 conversations with CSMs weren't sustainable across the customer journey. So we built out an end-to-end customer journey with digital and 1:many touchpoints at every key customer milestone from onboarding to renewal. We also worked with CSMs across various account sizes to understand their points of friction so that we could scale our internal operations as well, freeing them up to work more strategically with customers. Scaled models are not new in SaaS of-course, but when done thoughtfully and as part of broad PLG and SLG approaches, they can really provide an organization fantastic leverage.

Articulating customer pain points, desired outcomes and actions to take across each phase on a [Miroverse](#) template.

As our next step, after providing scaled coverage across the customer journey, we started to go phase by phase and optimize key parts of the digital experience. We started with our onboarding. We already had solid PLG onboarding but we needed to optimize the field motion. We had created a lot of scaled education content for onboarding different customer personas that was really resonating with them, so our scaled/digital CS efforts were really about sequencing out that existing content, distributing it more broadly and detailing it out more to ensure each persona hit their target outcomes for the onboarding phase.



Visualizing the customer journey based on digital and human touch activities. Learn how to build your own touch point journey or other artifacts - join our [Beautiful Board Design Webinar](#) - our next session is open for enrollment!

We then built in trigger points to alert us if these outcomes weren't achieved...thereby beginning to create a risk mitigation program that lived in parallel to our happy path journey, getting customers back on track if they veered off. We have iterated on our onboarding program so many times. We experiment, test, learn, refine, adjust, find new personas with slightly different needs and serve them, then iterate for them as well. This experimentation and iteration, along with the delight that our content provides, is key to our process – it is all part of our special sauce.

What success looks like

There are a lot of metrics you look at, and you will have some success stories...

There are a lot of metrics we look at, and your mileage may vary depending on your product, your target personas, and your industry's overall context. But in general, track your programs very simply at the beginning and then build out a more robust metrics framework depending on what your organization is optimizing for. I would suggest building out leading and lagging indicators across the customer journey and a motion to inspect health at an account level as part of your foundational metrics. An example framework to start:

- **Leading Indicators**
 - Onboarding Phase: License Activation (SLG metric) or Activation (PLG metric)
 - Adoption Phase: Usage or frequency based metric (Could be daily, weekly, monthly or quarterly active users, pretty standard across most industry contexts)
- **Lagging Indicator:** Gross revenue retention (GRR)

After the above simple framework, you can add on more nuanced phases to the customer journey, integrate health score dimensions into each phase, get granular by measuring the performance of your email programs and sequenced content, and start evaluating the health of your risk triggers – how effective are they in getting customers back on track and hitting originally planned targets? How efficiently are field teams leveraged to serve customer needs and drive outcomes? Where do digital motions work best and where is it absolutely imperative to engage with human touch? Over time you can have no- to low- to high-touch motions that are each pointed at the problems they solve best, and you can start to more dynamically segment your business now that customer coverage is hybrid and more sustainable.

Industry-wide, scaled CX is an idea that's gaining traction fast. When we first started down this road, I spoke to about 40 CX leaders in SaaS – almost no one was thinking about CX in this way. They had common

problems but teams in CX were fragmented and not super plugged into SLG or PLG motions, or were feeling caught in the middle of the two. Some were doing scale, but still using only varied touch models and did not run anything completely digital-only or digital-first in terms of CS.

Fast forward over a year later and many of these same leaders have built cases to combine these functions under them or have done so with similar titles to my own, and have also begun structuring teams the way we have. It's been really awesome to see, particularly in formerly staunchly PLG or SLG companies. Folks seem to be coming around to the idea that we need to use every smart strategy at our disposal instead of pitting different ways of thinking against each other. People also finally seem to be realizing how underutilized CX is within these methodologies, and bringing this function and all the capabilities it offers to the forefront of reducing friction and serving customers of all sizes.

Thanks for reading Growth Unhinged! If you <3 this post, please support my work by subscribing, liking and sharing.



How to start building your own scaled CX motion

When you're getting ready to build your own scaled CX motion, here's what I recommend you do. Some tough lessons I've learned the hard way, so you don't have to!

5 Tips to Kick-Start a Scaled CX Function

- 1** Map out every single existing **customer touchpoint**. Really.
- 2** Garbage in = garbage out. Prioritize **data hygiene** from the start.
- 3** Embrace **structured experimentation & measurement** to optimize both digital & human touch motions.
- 4** **Use automation wisely**. Mix in-app and email with 1:many & 1:1 where appropriate.
- 5** This is a **mindset shift**. Have patience, build together and have fun.

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Hire these roles, in this order

Before jumping into hiring, let me start by setting an intention. Hire and grow intentionally, following the prove-and-improve hiring model – start with what you’ve got, launch fast, iterate, scale across contexts and **only then** ask for more headcount. I’ve found that people get really hung up on empire building and think headcount-first instead of optimizing existing roles on the team and investing in talent and key programs. This type of thinking counterintuitively limits careers or harms reputations. It certainly doesn’t give them any advantages in building exciting, enduring programs. Focus on making your customers happy and running a lean business and the rest will come.

The roles and number of people you hire for your scaled CX team really depends on the type of product you sell and how many use cases there are for it, so one size does not fit all. Now with that said:

- **Start with what you have.** We started the SCE team as an education team with just three people, and have since grown and added on the production and digital success arms, and embedding operations and analytics teammates.
 - Initial role focus areas:
 - Miro Academy
 - Live Facilitated Programs
 - Help Center
 - Next steps
 - Production - generalist
 - Production - specialists
 - Team ADD-ON: Digital Success
 - Program Manager - Customer Journey
 - Solutions Manager - tech and data

- Program Manager - Risk Mitigation
- **Launch fast and iterate.** What is the first scalable surface your customers need? Is it a help center? An academy? Something else? Be sure you talk to customers, understand their pain points and launch something concrete but that will work long term as a destination for them and a place to host content and experiences for you. Build it out over time. Ensure a feedback loop exists from the start, whether that's article upvotes and downvotes for a help center to help you refine content, course feedback - both ratings and comments on a course... however small, ensure you can review feedback early and often.
- **Apply successes across contexts.** As your programs gain traction, scale them across customer segments, plans and personas. Look across your company's product line, use cases and identify the biggest points of friction for your customers. On the flip side, start evaluating the areas your field teams could use support. CS organizations have long been leveraging customer education to scale themselves but that is just the beginnings. Digital customer success, in partnership with other functions in your organization, can ride sidecar with CSMs and scale various other activities via the tech stack you've already got.

On a scaled team, every hire is like hiring five people. You really have to get it right because the potential for impact is outsized. And, because you're a scale team, if your growth always relies on more headcount asks, you're not necessarily living up to your team name. Scrutinize growth. Have discipline first. Nail your craft and only then make asks. Prove. Improve.

Your first hire or two can do it all for a while. They should be generalist superstars - folks who can [give away their legos](#) as you grow as the startup adage goes. Over time you may want to hire more specialists. We've added incredible specialists on our team as we have expanded our programs.

Complete two key artifacts

You need to complete two key artifacts to ensure you understand your existing state, so you can refine the experience, reduce the noise, and fill any gaps:

1. **Multi-channel audit.** Identify all the messages and outreach your customers receive throughout their journey with you. This includes email and in-app. It includes all surfaces your organization manages, from your website to your blog to where your customers open tickets - you name it! It's key to understand and empathize with what they're experiencing and when.
2. **Digital journey mapping.** Once you do the audit, map out every customer touchpoint across every channel used by your organization like the example illustrated earlier. Look at your touchpoints and identify where they are clustered. 9/10 times most organizations overinvest in onboarding and have little to nothing driving adoption or multiple use cases in an automated way. Onboarding is of course critical - it is your customer experience 'top of funnel', without which there is no adoption. Ultimately, you want a journey that serves customers no matter where they are. Additionally, ensure that longtime customers haven't aged out of your offerings. You want your 3, 4, 5 year customers to continue to have valuable scaled experiences with you just as they did in year 1.

Capturing every touch point may seem overwhelming but I've got you - check out these great [journey mapping templates on Miroverse](#), created by some of the most brilliant minds in the biz!

New to Miro or want to learn how to create your own templates? Check out our [Academy to build your expertise](#) with free courses, videos and live webinars.

Prepare your scaled CX architecture in this way

Take a step-by-step approach to building out the architecture you need for scaled CX. Here's what I recommend:

1. **Combine any existing customer education and digital success teams.**
2. **Set up a simple tech stack** including an Academy, Help Center and CS system of record (e.g., Gainsight) at a bare minimum. Then you can layer in other things (events, in-app flows, customer community, etc.) as needed. Make everything cohesive with federated search and get innovative with chatbots, virtual assistants and more over time. You'll want to partner early on with your ops and business tech teams for this step.
3. **Get your contact management, data hygiene and consent management under control** by proactively managing the garbage-in/garbage-out problem. You'll need this done to set the stage for personalization and segmentation. Your analytics and insights team will be your besties here.
4. **Keep content production in-house** – it's a huge enabler of speed. Outsourcing production (or simply making it cross-functional) will gum up the works and delay the gains you could make toward a unified experience and tone. Our content is the jewel in our crown and we built our first studio in Austin with about \$300 during the pandemic. The team was carrying spare couches in and out of garages and filming videos come rain or shine. We've since upgraded our space but I love where we started. Looking at our content from that year, you can't tell our humble beginnings.
5. **Prioritize collaboration and customer outreach conversations with product and marketing teams.** Share goals and governance with each other to reduce noise and increase the overall value you provide to your customers.

to your customers.

6. **Research** – just because digital customer support isn't 1:1 doesn't mean you shouldn't ever talk to your customers 1:1. Do a lot of research. Data analysis should be your day to day bread and butter but there is no substitute for talking to customers and end users. You can do user research in very fast and lean ways to rapidly improve your scaled CX offerings exponentially when you first launch.
 7. **Create a real experimentation capability** on a scaled CX team. Experimentation doesn't mean "try" – and it's not just for product teams. You shouldn't be guessing what's working well across your scaled offerings and in your digital + scale cs model. You should KNOW.
-

Start with proven, high-impact initiatives first

Start by tackling some of your fundamental CX problems and providing coverage that gets you out of a linear headcount growth model. You want your CSMs to spend their time more strategically – you need to automate the rest or make it self-serve.

As mentioned earlier, onboarding is usually a great place to start because:

- It's the first step in the customer journey - every persona needs onboarding
- You'll immediately understand how clean or messy your data is, early in the process
- You can very clearly continue to iterate it until you hit your desired onboarding outcome and advance users to the next phase

But – it's important to keep in mind that you must measure BOTH types of onboarding activation in order to optimize onboarding as part of a scaled CX journey:

- **License activation (typically an SLG KPI)** – How many people claim/activate the licenses they purchase/are assigned to them
- **Product usage activation (typically a PLG KPI)** – How many people get to their “aha” moment and find initial value in the product

After onboarding, it's a good idea to optimize any existing CX touchpoints you aren't doing much with yet (outside of CSMs having one-to-one calls with customers). For instance, for NPS surveys:

- **What happens if you have a detractor** – do you initiate a private conversation with them to dig deeper into their issues?
- **What happens with your rave reviews** – can you automatically cycle them into an advocacy program?

After these first steps, you're ready to begin optimizing bigger CX initiatives (e.g., customer feedback loops, product feedback programs, go-to-market initiatives for rolling out beta testing programs to customers). There is a whole world out there for you to tackle...get out there and do it. Have patience, build with everyone across your organization and have fun!

Thanks so much to Dee Kapila for sharing her hard-earned insights about scaled CX! [You can follow Dee on LinkedIn here.](#)



A guest post by

Dee Kapila

Goa-born, Curaçao-raised, Austinite. I built and currently lead the SaaS industry's very first Scaled Customer Experience function At Miro.

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