



## PARTNER CASE STUDY

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# InSource Solutions prioritizes customer success for sustained growth

## Goals

- Shift sales from an in-person to a virtual environment to support public health measures during the COVID-19 pandemic
- Increase subscription revenue and support customers through the process from presales to renewals
- Ensure successful adoption and implementation of AVEVA software

## Challenges

- The sales team was not organized to support the LAER model
- Customers shifting focus to the business value of software rather than individual features

## Solution

- AVEVA customer success program

## Results

- Adoption of the Client Success Program (CSP) resulted in an opportunity value of \$2M
- Increase of 9.4% in the overall amount of renewal revenue on CSP-managed accounts
- 92% of CSP customers renewed their contracts, versus fewer than 80% of customers who did not participate in the CSP



**United States** - InSource Solutions has provided industrial solutions for over twenty years, serving over 5,000 organizations. As an AVEVA distributor, it provides everything from SCADA, MES, IIOT analytics, asset management, digital workflow solutions, and IT hardware technology. The company might have stopped there, content with providing its customers access to AVEVA's broad and integrated portfolio of industrial software. Instead, it is helping disrupt the way industrial software is sold and supported.

### A dramatic shift toward virtual sales

In 2020, the global COVID-19 pandemic upended traditional methods of selling software solutions and providing customer support. Customer interactions quickly pivoted to virtual channels, and a revolution occurred in the workforce with a realignment toward socially distant but collaborative team-based work methods. Customer systems grew in complexity as businesses rushed to augment human operators with tools that allowed them to work remotely and communicate with colleagues across a plant or even different sites.

InSource was quick to recognize and act on these market changes. It once again looked to long-time partner AVEVA for inspiration to create a more sustainable business that ensured customer success and increased loyalty. Recognizing the success of AVEVA's Customer Success Program, InSource formed its own Customer Success Program (CSP), and modeled it after AVEVA's. By ensuring customers have a strong foundation for growth, InSource reaps rewards like lower attrition, more sales opportunities, sustainable revenue growth, and much higher customer satisfaction.

### The LAER model for customer success

The way industrial software is sold and supported is changing. Rather than selling software solutions to customers for a one-time upfront cost, more companies are offering subscription licensing, which allows customers to make a smaller investment to get started. Customers are also more interested in the business value software can bring them, rather than the exact set of features. These new customer demands led InSource to look for another model for supporting customers over the entire term of the partnership, rather than just during the initial sale and for upgrades.

Both AVEVA and InSource have adopted a sales model developed by the Technology and Industry Services Association called the LAER model to ensure customer success over the course of their partnership. The stages of sales with LAER are:

- **Land:** This stage includes all sales and marketing activities before the sale.
- **Adopt:** The adopt stage is the critical phase where the software supplier helps ensure that the customers are successfully using the solution and capturing business value.
- **Expand:** This is the stage where the supplier helps customers find opportunities to expand their uses of the solution by introducing them to new tools and features that can help them advance their digital transformations.
- **Renew:** Because customers will only renew if the implementation of their solutions has been successful, the renew stage is an opportunity to check in and support customers prior to their renewal period and ensure they're ready to commit to another term.

As InSource began to offer AVEVA™ Flex credits, it soon realized it would need to shift marketing and support resources to support customers for the duration. The company looked for a proven model to improve customer success and found that AVEVA's customer success program could be replicated to serve its customers as well.

## Customer success

InSource begins the adopt stage of the LAER model with a Client Success Program (CSP) that includes the goals of InSource's clients and the outcomes they expect. It aims to understand what will impress or disappoint clients, and it tracks customer success to improve their overall experience. The CSP also helps InSource plan regular client check-ins, resolve issues, and aid customers in adopting the full capabilities of their software. From there, it onboards clients to ensure they fully understand their purchase entitlements and know how they will achieve their desired outcomes.

With the CSP, InSource moves into the adopt phase of the LAER model to make certain clients are getting the results they expect from their purchase. It identifies training and support needs and looks for opportunities to expand the solution by adding additional tools or standardizing the solution across multiple plants. In this stage InSource shares best practices, issues escalation and recovery plans, and conducts a business review to ensure customers are seeing value from their investment and finding opportunities for expansion.

Renewal is much more likely following these activities. InSource makes certain customers are satisfied every step of the way and continue to ensure its clients' success as they expand and renew their stack of solutions.

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**“The goal of the organizational redesign was to be more purposeful in the value we were delivering and not leave the long-term client experience to chance.”**

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**Ann Croom**  
InSource CEO

## Creating new opportunities

From the initial implementation of the program, InSource has generated 108 inquiries, developed 89 client success plans, and onboarded 71 new clients, for an opportunity value of over \$2M. It has increased organic sales opportunity growth thanks to client success advocates, and renewal business has grown to 55% of annual revenue.

InSource also saw a 9.4% increase in the overall amount of renewal revenue on Client Success managed accounts. This number doesn't just represent renewal dollars, but also demonstrates effective technology adoption by its customers—a measure of success for the program. Ninety-two percent of CSP customers renewed their contracts, versus fewer than 80% of customers who did not participate in the CSP.

The dramatic shift in employee roles and responsibilities required to successfully focus on customer advocacy has paid off as well. The success of clients highlights the value of InSource's team, and the regular touchpoints with customers have increased their willingness to invest. InSource has also discovered that the cost of landing sales actually decreased when using the client success team.

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**“Execution of client success plans has strengthened customer relationships, extending our reach to new contacts and resulting in many positive benefits including the addition of \$2M in opportunity pipeline.”**

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**Ken Jones**  
InSource Manager, Client Success

For its next steps, InSource will take the lessons learned from the program to make improvements, like better aligning employee skills with the LAER model, and developing an organizational structure based on customer needs to more efficiently support them.