



# Customer Success Specialist (CSS)

## What is Customer Success?

Customer Success is a long-term, scientifically engineered, and professionally directed strategy for maximizing customer and company sustainable proven value.



## Who are Customer Success specialists?

Customer Success Specialists are the one who have:

- In-depth knowledge of the customers
- Effective expertise in the product(s) being sold
- Extensive business expertise



## Why assessments for CSS?

Support critical talent decisions for Customer Success Specialist through objective and reliable talent measurement specific to the organization across multi-faceted skills and knowledge areas.



# How to Identify Talent – Requirements

I need to identify and hire potential candidates for Customer Success Specialist roles at different experience levels. I do have a few candidates but:

Do they have good problem-solving skills?  
Are they highly analytical?  
Are they good at communicating with others?

Can they make good PPTs?  
Are they comfortable with MS Excel?

Can they comprehend well?

Do they possess basic industry knowledge to initiate conversation?

Do they have expertise in handling client issues?

Are they good at negotiation?







Can they convert customers into long term advocates of the company's product(s)?

Are they effective at managing people?

While I need to assess all these but I also want to save my interview bandwidth  
How can I do that?

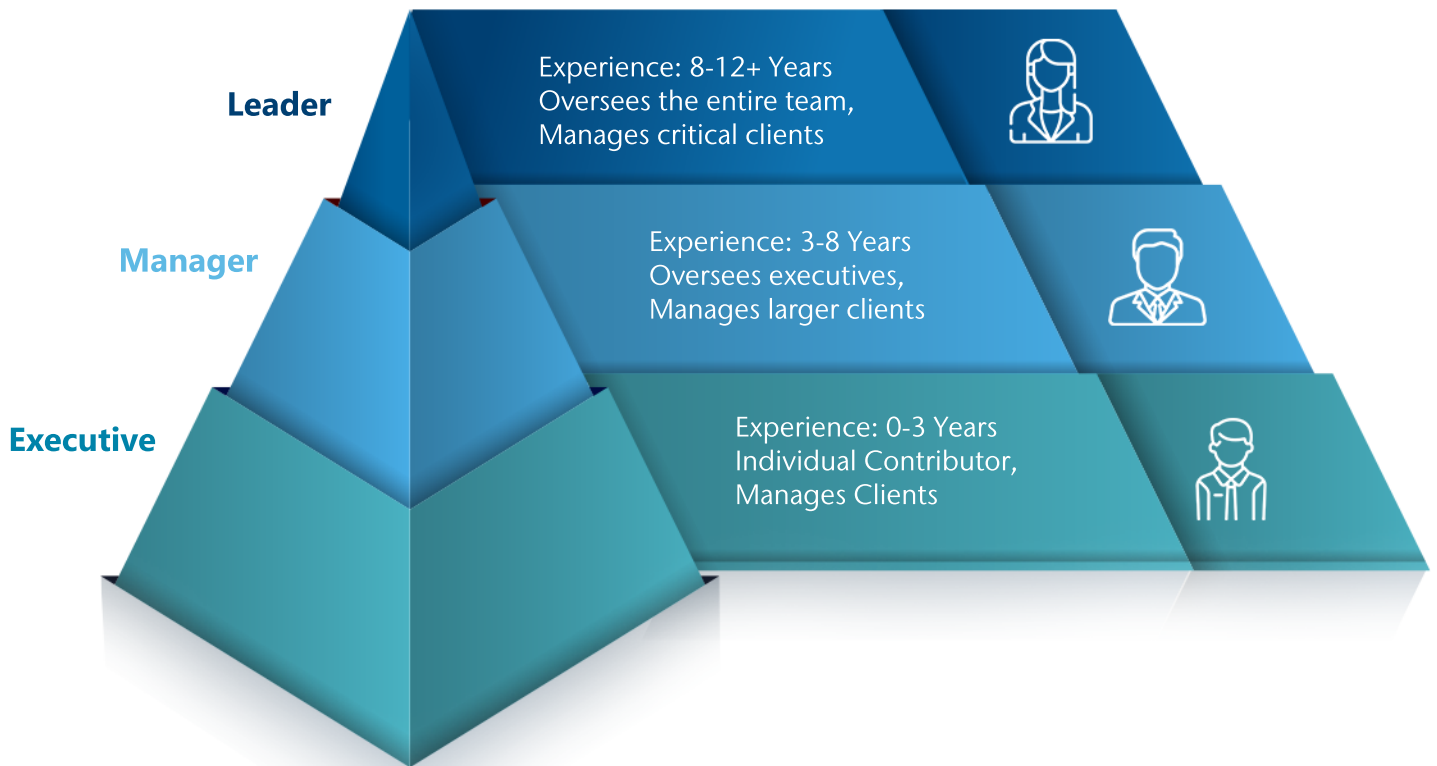


# Mapping Requirements to Assessments

| Requirements  | Abilities/Knowledge Areas   | Assessment Name                            |  |
|---|---|--|---|
|  <ul style="list-style-type: none"> <li>• Strong mental ability and reasoning capacity</li> <li>• Should possess learning and training agility</li> <li>• Should be proficient in comprehending written text</li> </ul> | <ul style="list-style-type: none"> <li>• Analytical Ability</li> <li>• Quantitative Ability</li> <li>• English Usage</li> </ul>                                   | <b>Cognitive Ability</b><br>(20-30 items)  | <b>20-30</b><br>Minutes   |
|  <ul style="list-style-type: none"> <li>• Should have basic Industry knowledge</li> </ul>   | Basic industry knowledge  | <b>Industry Awareness</b><br>(10-15 items) | <b>10-15</b><br>Minutes   |
|  <ul style="list-style-type: none"> <li>• Should have good English writing skills</li> </ul>  | WET<br>(Written English Test)   | <b>Communication Skills</b><br>(1 Item)    | <b>15-20</b><br>Minutes   |
|  <ul style="list-style-type: none"> <li>• Should possess good Presentation skills</li> <li>• Should be proficient in MS Excel</li> </ul>  | <ul style="list-style-type: none"> <li>• PowerPoint</li> <li>• MS Excel</li> </ul>  | <b>Tool Knowledge</b><br>(15-20 items)     | <b>15-20</b><br>Minutes   |
|  <ul style="list-style-type: none"> <li>• Should possess certain behavioral aspects and preferences that are critical for successful performance in the role</li> </ul>   | <ul style="list-style-type: none"> <li>• Awareness</li> <li>• Drive</li> <li>• Mastery</li> <li>• Ambition</li> <li>• Cooperativeness</li> <li>• Power</li> </ul> | <b>Work-Related Behavior</b>               | <b>20-30</b><br>Minutes   |



# Customer Success – Levels



## Relevant Industries



### BFSI

- Company knowledge
- Emerging trends
- Structure and Types of Banking
- RBI and Banking Policies
- Banking Business
- Negotiable Instruments
- Insurance
- Capital Markets and Money Markets
- Non-Banking Financial Companies
- Derivatives Investments and Futures
- Global Banking Regulatory Framework



### IT Product

- Company knowledge
- Emerging trends
- Software development life cycle (Requirement gathering, Analysis, Implementation, Testing, Maintenance)
- Testing life cycle (Requirement analysis, test planning, test case development, Test environment setup, test execution, test closure)
- Software Project Management



### E-Commerce

- Company knowledge
- Emerging trends
- Supply Chain Management
- Embedded Systems Management
- Best Practices
- e-Procurement
- Merchants
- Payment Gateways
- Third Parties



### IT Services

- Company knowledge
- Emerging trends
- Software project management
- IT Infrastructure (Cloud Computing)
- ERP Enterprise resource planning
- IT S&M (Service and Management)

# Assessment Solution (Role-Wise Evaluation Framework)

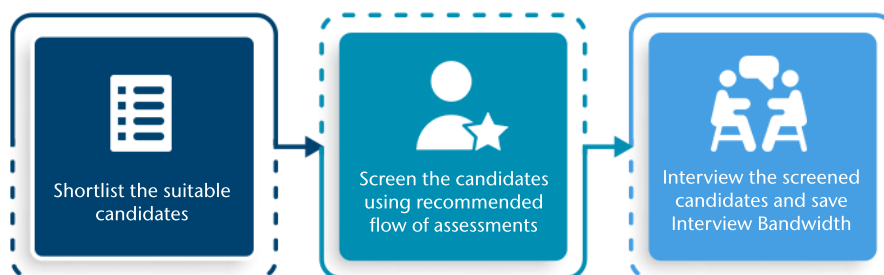
The relevance / importance of each evaluation method differs across the typical roles and their corresponding experience brackets – the table below indicates the recommended criticality

| Package   | Cognitive Ability |                      |               | Communication Skills | Industry Awareness | Tool (PPT+ Excel) | Work-Related Behaviour |
|-----------|-------------------|----------------------|---------------|----------------------|--------------------|-------------------|------------------------|
|           | Numerical Ability | Analytical Reasoning | English Usage |                      |                    |                   |                        |
| Executive | Moderate          | High                 | High          | High                 | High               | High              | Moderate               |
| Manager   | Moderate          | High                 | Moderate      | High                 | Moderate           | Moderate          | High                   |
| Leader    | Low               | High                 | Low           | High                 | Low                | Low               | High                   |

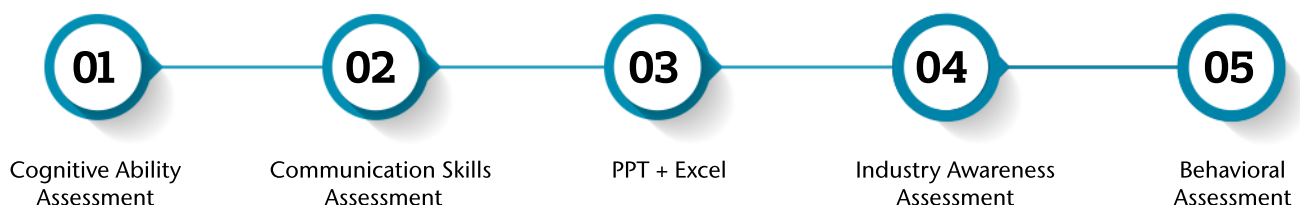
● Low    ● Moderate    ● High

## Assessment Flow

For any role, a holistic approach to candidate evaluation ensures information is captured on all skills / abilities / competencies for better decision making. The following is the recommended flow to assess and hire best fit candidates for the role, though this can be configured/ customized as per client's requirements.



## Recommended Flow of Assessments



# About Assessment Solutions

Aon's Assessment Solutions includes the cut-e and CoCubes brands and operates as part of Aon's global Human Capital solutions, helping clients achieve sustainable growth by driving business performance through people performance. Aon's Assessment Solutions group undertakes 30 million assessments each year in 90 countries and 40 languages.

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## About Aon

Aon plc (NYSE:AON) is a leading global professional services firm providing a broad range of risk, retirement and health solutions. Our 50,000 colleagues in 120 countries empower results for clients by using proprietary data and analytics to deliver insights that reduce volatility and improve performance.



## Contact

If you want to learn to more about Aon's Assessment Solutions, visit us at: [assessment.aon.com](https://assessment.aon.com).

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