# A SOLUTIONS ENGINEERING MANIFESTO
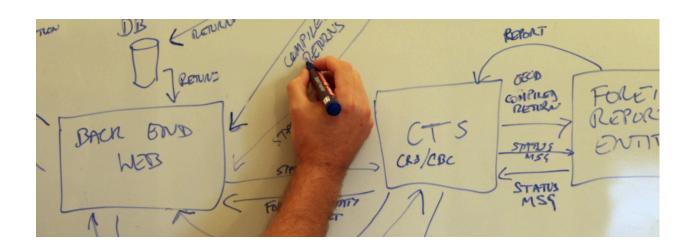
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# An Opinionated Take on

# The Solutions Engineer

# in organizations where a

# Customer Success program

# exists or should exist

**tldr;**

*The Solutions Engineer is the foot-soldier of Customer Success - if you have limited resources, don't know where to start, or want to get the most bang for your buck - start with getting the Solutions Engineer role set up and operating.  Everything else works up and out from there.*

**The Rise Of Customer Success**

It is well documented that with the advent of Software-as-a-Service (SaaS) and the transition from license-based software to subscription-based software, a new sales and customer retention strategy was needed.

Software products and services were becoming more *solutions* focused - encompassing broader or deeper swaths of the customer landscape, and this, in turn, demanded sometimes complex configurations, semi-custom product demonstrations, and other technically sophisticated interactions between sales teams and prospects.

Additionally, given the short-term nature of software subscriptions and the possibility that a hard-won customer could simply drop their subscription at the next renewal date, customer satisfaction was seen as critical to customer retention and therefore ongoing revenue generation.

These factors gave rise to a new function or strategy known as *Customer Success* - a comprehensive focus on the customer within the Sales, Operations, Support, and Finance organizations predicated on the belief that a company's success is entirely

dependent on the *success of the customer*, particularly in the use of the company's product or service.

## Blurred Responsibilities

Each of these classic departments had well-defined technical responsibilities with respect to the customer, and technically trained staff to handle those duties.  But as the importance of customer retention began to rise, demand increased for a consistent customer experience across these departments.

The interfaces between the functions became more important - the handoffs as customers transitioned from prospects to users could not be overlooked - the primary responsibilities for customers just got blurry over time.

Product Teams also had new opportunities to learn from customers using the product - but there often was not a formal mechanism for that flow of information and experiences aside from a Bug Report or a time consuming Technical Support interaction.

## Enter the Solutions Engineer

As previously stated, the traditional customer-facing departments often had trained technical resources on staff but all resources, particularly technical talent, are limited. This creates resource tension between those departments as the customer transitions through the customer lifecycle - from Sales to Evaluation to Onboarding to Support to Renewal.

Easing that tension is accomplished by blending the technical responsibilities from those traditional departments into a single resource - the Solutions Engineer - coupled

with the appropriate internal applications and the organizational freedom (will) for the Solutions Engineer to operate across each of those departments as the customer advocate -  the customer *concierge* of sorts.

## Chiefs and Indians

Customer Success as a formal business function and strategic imperative is certainly important enough to demand effective leadership, but sometimes there may not be an appetite (or the budget) for the full roster of players.  If this is the case, it is strongly suggested to start at the bottom - with the Solution Engineer, over a Manager or Director of Customer Success.

This is because the Customer Success principles and motivations are well known, the priorities can be thoughtfully determined by managers of the customer-facing departments, and much of the work is driven by process and tooling.  With priorities, process, and tooling in place, a good Solutions Engineer can get to work.

As the Customer Success function grows and starts showing results, the need for a Manager or Director will become clear.  But not at the beginning - work has to get started, customers need to get engaged, processes and tools worked in and worked on.

## The Engineer Part

In essence, the Solutions Engineer could be known as the *Customer Success Engineer*, playing the key role in implementation, operation, and maintenance of the tooling and processes used in the Customer Success function.  The precise tools and arrangement of processes and actions will differ based on many factors, but the primary responsibility for 'how it all works' generally falls on the Solutions Engineer.

Again, the outcomes of Customer Success are well-known, or at least easily determined - but *how* those outcomes are achieved belongs to the Solutions Engineer.  True engineering involves knowledge and skill in applying tools to achieve an outcome or effectively execute

a process.  Most of the tooling is pretty standard, the actions and processes are well understood and explicit - it is now time for the *art* of engineering to shine through - under the able hands of a solid Solutions Engineer.

## Frameworks, Tools, and Processes

 The Customer Success function can be implemented in a thousand different ways, depending on factors such as resource availability, incumbent tooling and platforms, product or service type, budget, and organizational will, among others.  Here's an example of the various products used for parts of the Customer Success function:
https://www.customersuccessassociation.com/library/the-customer-success-techmap/

It is not the goal of this manifesto to specify which tools or frameworks are the best for a given action or outcome, but to impress on the reader that it is the Solution Engineer who will make it work, regardless of the tooling.

## How To Get Started

The Customer Success journey is a long one and certainly will go beyond the sole concerns of the Solutions Engineer role as emphasized here, but focusing on that role first will pay dividends.

It is very likely that many of the eventual processes for Customer Success are already in place within your organization.  The foundational principles are not something just invented in the SaaS era - successful customers are the lifeblood of any profitable company.

The commitment to a Solutions Engineer will start the process of solidifying the specific customer-focused processes that do belong to the Customer Success function, and not within the traditional Sales / Operations / Support silos.

Exactly how those first steps are taken will also vary - from a heavy designed and planned approach to a more evolutionary stance.  The key is to have a committed resource in place with hands-on accountability, and the knowledge and experience to push things forward.

## Summary

The evolution to primarily SaaS products has drastically impacted the revenue generation equation with respect to customers and customer retention.

As a result, the business functions responsible for care and handling of Customers have also evolved, and resulted in the emergence of the Customer Success function.

The key role in that Customer Success function is that of the Solutions Engineer - the single resource that is intimately connected to the customer across the entire life cycle.

By focusing on the Solutions Engineer first in startup and scaling organizations, efforts will immediately begin that have impact on the customer, and the evolution to a complete Customer Success realization will be well on the way.

Resources from [FractionalSE.com](http://FractionalSE.com) can help to get started or jumpstart your efforts.