

Katriona Lord-Levins talks about customer success industry and digital adoption



An interview with **Katriona Lord-Levins, Chief Success Officer, Bentley Systems**, an American software development company that excels in engineering software, talks about the customer success industry and how a project is completed by Bentley systems.

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TECHx – How excited are you about the *2022 Year in Infrastructure and Going Digital Awards*, especially when the journey of most user success stories here would have started with you?

Katriona – Thank you, I appreciate being here. I always look forward to spending time with our users and hearing about their concrete examples of success and quantifiable results. It is quite exciting to hear about these incredible projects and understand all of them, as our users solved crucial challenges with their infrastructure projects. Also, their stories of success provide real value to the rest of the industry that can learn from them.

To me, these awards, the winners, the runners-up, and all the people that play a part are what make these stories most valuable. It is gold dust for our users, and it is gold dust for us because we learn so much from them. Our job is to figure out how to help them get their business value out of our solutions to meet their business goals.

TECHx – While results are talked about often, what goes on in the background at Bentley from initialization to creating and delivering a successful project?

Katriona – I have simple metrics of success, and I always say that there is two sides of a coin. On one side, there are people who are using our software, and we can measure how many hours they are using our applications. The other side of the coin is why are they choosing to use our software? What is their sentiment? Their thoughts? They might be doing a set of activities one day because it is mandated and because they have to, but something could come along the next day and disrupt them. We want to make sure that they are performing the particular steps because they want to, and not because it is mandated.

Our team here at Bentley works very closely with our accounts to help them get their projects set up. First, we start out trying to understand their business problems to create a success plan with our accounts and from there, we derive how we can help them along their journey toward success and what success means to them. We measure our users quarterly, and then go back and actually see how we are progressing. Every time we finish an engagement with our accounts, we call them blueprints, and we go back and measure it to see if it was successful. Did we set the right expectations, and what was the outcome?

So, the success results for every account could be very, very different. But for us, we are looking for the overall sentiment that says we did what we set out to do for you, and we ask them what the benefits were. We can also rinse and repeat those plays. They are plays that we can take to other accounts and say, here is what we did with X, Y, Z account and here are the savings they achieved. From there, we can help them get up and running. That is what we think about every single day—how do we grow usage and sentiment at the same time.

TECHx – How open do you think the CEOs/CTOs are to adopting new technologies, and in what technologies are they investing?

Katriona – At a recent AEC Advisor meeting in Phoenix, we had several hundred CEOs in the room discussing current challenges with *going digital* and digital transformation. The survey that they had there said that about 38% of CEOs were not comfortable *going digital*, and they were not thinking along that path. I think the majority of CEOs want to keep pace and stay at the front of digital transformation and everything to do with our digital twins' idea but they don't know how to implement it. They are struggling not only with the "how do we do it?" part, but also how would they mobilize their people. How do they change the way their people do things the way they are used to, and get them to shift?

We run into those accounts where their biggest issue is not having enough resources, and they have to do more with less. So, they are struggling with that too, and we have to help them do more with less and show them how *going digital* can get them there. Our job is to eliminate the fear of using digital tools from our users and help them adopt new technologies. A major part of our job is to equip them, through training, and give them access to all kinds of available resources to help them in their transformation. So, I think they have an appetite to do it but they are up against headwinds of people, lack of resources, and the thought that the business might outpace them. We are trying to keep that balance going and take some of the load off

them by onboarding new people and get them the training they need to help them mobilize faster.

TECHx – Building a loyal user base is key to any organization’s success. How much do you think the customer success industry has evolved over the years and how do you drive success?

Katriona – It has definitely evolved. For Bentley, there were elements of the success force always in play because Bentley cares about its users and puts them at the center. However, we wanted to formalize the success department as part of our structure for that real rigor that we wanted to put in place. Success today has become more important—because technology is only one element. But, as you see, people make up the companies, so we need the softer skills to actually help people to adopt and adapt. Success and services become the key differentiator. It is what matters the most, and this is where we are trying to add more value.

Also, in terms of the customer success industry—what is very important to look at is that the changing element of customer success is not just support, not just about service, but it is actually about shifting customers away from just a point-and-click relationship. We are moving ahead of, “I am using this solution, how can I do this? How can you fix this for me?” These are all point-and-click solutions, and we are trying to get ahead of that and become more strategic partners with our accounts. We try to get in there and actually help them see the problems, to help them state that problem well. There is a big possibility that it might not be related to the Bentley solution, but we want to be in the room with them to say, “This is the problem and how can we innovate together,” because they help us to drive direction.

So, listening to our users and closing the loop with that user, that is the piece that success is evolving toward. You can say that the shift is to move from the service side of point-and-click to keeping customers up and running, getting them into the innovation stateside, listening to them, getting ahead of what they need and becoming more of a strategic partner. That is the future. That is how we learn—by listening to our accounts and not just from listening to fix this or fix that but to get to the real problem. You have to ask those five “whys” and get to the root cause so you can innovate together and solve that bigger problem for customers.

TECHx – As a powerful woman leader in tech who drives success and has achieved so much, what advice do you have for women who are pursuing a career in technology or any other field? Some key takeaways from your experience?

Katriona – The first thing I would start off with is belief. Believe in yourself! And I think that is true for everyone. I think the more that we have confidence and belief, the less our insecurities have us sort of creating an ego that is not necessarily needed.

I want to touch on the fact that when we talk about belief, it is my belief that diversity of thought is the most important thing that you can bring to the table. And it is our differences that actually help us to see around corners at the end of the day. I think there is a lot of truth in that and the fact that women will bring different thoughts to the table, they bring a different approach a different rigor to whatever they are doing. And I think we should not be afraid to show those things; always capitalize on your strengths, believe in what you are doing and don’t let insecurities get in the way.

I always believe as well that information shared is growth. Do not be afraid, do not hold things too close to yourself. Share, be open, grow all the people around you, share your learnings and grow together. Getting over a finish line alone is no good. Getting over a finish line with people, that is a leader, and that is how you differentiate yourself.

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