Custify

How to Improve Your Customer Journey with a **Customer Success Platform**

A Custify eBook

Contents

Introduction

The Times Are Changing

In the B2B world, things have changed - dramatically.

Gone are the days of companies throwing all their resources at Customer Acquisition as a mechanism for ARR growth and business stability.

To be frank, sales are more difficult to come by than they used to be.

Budgets are being cut everywhere, and many companies are laying off staff, so the idea of buying new SaaS or services is often being postponed or scaled back.

> **30%** of SaaS companies report their churn rates have increased in the past year.
>
> Reply.io

Instead of Sales being the golden goose for B2B companies, the focus now is on product adoption, customer retention, customer expansion, and ultimately, customer advocacy.

You're probably more than a little familiar with these topics - they're the fundamentals of Customer Success.

> **78%** of CSMs are now responsible for revenue retention and generation.
>
> LinkedIn Poll in CS group

With company performance now being measured by core CS metrics like Churn and Net Revenue Retention - just as much as Sales KPIs like Net New Business or Pipeline Value - it means that Customer Success has never been more critical or more under the spotlight.

Opportunities Abound for Customer Success

Because of this change in business priorities, Customer Success leaders have an opportunity in front of them.

Not only can they make sure their function becomes the core growth engine that B2B companies are craving - but they can also leverage this to get a 'seat at the table' to have a voice in the boardroom.

This means CS will finally get the respect it deserves and will provide the impetus for companies to become even more customer-centric as a result.

In order for Customer Success functions to maximize the opportunity they have in front of them, they're going to need to use every trick in the book - starting with a well-oiled and highly optimized Customer Journey

Introducing the Customer Journey

As a quick refresher - the Customer Journey is the name given to the complete set of experiences your customers will go through during their relationship with your business.

This journey covers everything from Pre-sales and Sales to Implementation, Adoption, Expansion, Renewal - and all the other touchpoints in between.

> A compelling CX demands balancing customer empathy with technology.
>
> **Harvard Business Review**

As CS functions start to scale past a few customers and a handful of CS team members, the complexity of managing their customer journey will also tend to increase.

At this point, most B2B SaaS companies will look towards adopting a **Customer Success Platform** to help control the entire customer journey.

The Importance of a Good Customer Journey

Your customer journey should feel completely seamless to your customers.

From their perspective, you should be at least one step ahead of them at all times - having already anticipated their needs, even before they have.

The last thing a customer wants to feel is that you're making it up as you go along and 'laying the tracks out in front of you' as you go.

> **80%** of customers say that the experience a company provides is equally as important as the product.
>
> Salesforce

You want your customer journey to leave your customers feeling confident that they've made the right choice in choosing you as their supplier - and excited to build a long-term relationship with you.

One size does not fit all, though.

When you take the time to understand the customer's needs, pain points, and preferences at each stage of their journey, it gives you something of an unfair advantage compared to vendors who don't do this.

This level of personalization can significantly enhance customer satisfaction and loyalty, thereby increasing the lifetime value of a customer.

Some key benefits of a positive customer journey for you to consider:

- ✓ Increased adoption rates
- ✓ Higher customer retention
- ✓ More - and better quality - upsell & cross-sell opportunities
- ✓ The chance to develop customer advocates
- ✓ A repeatable and scalable process

Some key drawbacks of a poor customer journey can include:

- ✗ Low adoption rates
- ✗ Increased churn rates
- ✗ Lack of expansion revenue
- ✗ Negative reviews / NPS / word of mouth
- ✗ Burnout of your CS team

High Touch, Low Touch, Tech-Touch

The reality is, though, that as much as you may want to give every customer the complete 'silver service' - oftentimes you simply can't.

This usually boils down to three things:

- → Cost of delivering high levels of personal service
- → The price point of your product and the available margin in it
- → The customer's expectations and willingness to engage

To help you overcome these challenges - and make sure you aren't operating an unprofitable CS model, there are three key strategies you can adopt.

1. High Touch

This is usually only reserved for your highest-paying and most demanding enterprise-level customers. High Touch CS management provides a dedicated CSM for the account who is on hand to offer personalized guidance and support at all times throughout onboarding and beyond.

Positives:

- ✓ It helps to form a deep relationship with your customer
- ✓ It's an effective way to ensure quick TTV (time to value)
- ✓ It makes it easy to predict and pre-empt issues or opportunities

Negatives:

- ✗ It is expensive to operate this model
- ✗ It is not as easily scalable as other CS models
- ✗ The customer can become over-reliant on the CSM

2. Low Touch

It won't surprise you if we tell you that low touch is pretty much the exact opposite of high touch customer success management. Customers are largely self-serving and only choose to speak to a CSM on an occasional basis.

It's a great strategy to use for SMB and mid-market customers who don't have the demands and advanced requirements of an enterprise customer and, for the most part, are happy being left to it.

Positives:

- ✓ It helps to form a deep relationship with your customer
- ✓ It's an effective way to ensure quick TTV (time to value)
- ✓ It makes it easy to predict and pre-empt issues or opportunities

Negatives:

- ✗ It is more difficult to track how your customers feel about your product
- ✗ Pre-empting issues becomes more difficult than with high touch clients
- ✗ The customer can feel like they've been forgotten about

3. Tech-Touch

Tech-Touch has been a growing trend in Customer Success for the past few years.

It's special because it is the ultimate 'best of both worlds' hybrid model that can be adapted and adjusted to the specific needs of you and your customers.

Put simply, the more routine tasks in your customer journey are handled by automated technology, while CSMs can step in to add a 'personal touch' for the more complex issues that require specialist intervention.

Positives:

- ✓ It can be a great way to scale your customer success offering.
- ✓ Customers get instant access to everything they need & on-demand access to a CSM on top.
- ✓ You can adjust & adapt based on the needs of specific customer segments.

Negatives:

- ✗ You lose some of the ability to influence your customers that you get with the high-touch model.
- ✗ Even your enterprise customers can be left to their own devices at times.
- ✗ It may not be suitable for all types of customers

How The Right Tools Will Help

Dedicated technology, such as a customer success platform, can help you to transform the experience your customer gets during their journey with you.

This means you can create a customer journey that isn't just a series of disjointed touchpoints - but instead is a cohesive, engaging, and rewarding experience for your customers.

We appreciate that it's a complicated topic, so think of this eBook as your comprehensive guide to improving your customer journey through the power of Customer Success Platforms.

In the following chapters, we'll delve deeper into exactly how you can use a Customer Success Platform to:

- ✓ Transform handovers
- ✓ Streamline QBRs
- ✓ Improve customer communications
- ✓ Create high-quality personalized experiences
- ✓ Leverage data to take your journey to the next level,

and bring it all together with some incredibly smart automation.

v

As you turn this eBook's pages, you're not just reading—you're embarking on a transformative journey. A journey that will elevate your Customer Success game from good to extraordinary. With the right tools, you're not just managing customer journeys; you're orchestrating symphonies of experiences that resonate on a personal level. So, let's dive in and unlock the untapped potential.

Philipp Wolf

Founder & CEO at Custify

CHAPTER I

Transforming The Handoff Between Internal Teams

In any customer journey, one of the most critical - yet often overlooked - elements is the ‘handoff’ between internal teams.

A handoff is a fancy name for the point in a customer journey where your customer is passed from one team to another, dealing with new people in your company as a result.

Some people liken a ‘handoff’ to the passing of a baton in a relay race - because it needs to be a smooth and seamless transition, or things can go drastically wrong.

Whether it’s the transition from marketing to sales or from sales to customer success, these handoffs are pivotal moments that can make or break the experience for your customers.

The challenge is that many organizations either don’t have appropriate processes in place - or choose to do everything manually.

This leads to inconsistent experiences for your customers and the potential for important information or possible additional revenue to fall through the cracks.

Luckily, many of these issues can be fixed by adopting the right technology - not least a Customer Success Platform.

So, let’s dive in and explore some common issues with handovers and how technology can help you avoid them.

Problems with Manual Handovers

To help you identify the areas you need to fix or improve with your handovers, let's outline some of the key problems you're likely to be facing by doing things manually.

Manual handoffs are like passing a baton in a relay race blindfolded – there's potential for drop-offs. I've seen miscommunication and missed opportunities. Technology with automated workflows reduces these human errors and ensures a seamless transition.

Jeff Breunsbach

Director, Corporate Marketing @ Higher Logic / Co-Founder @ Gain Grow Retain

1. Lack of Standardization

When handovers are done manually between teams, It's not uncommon for there to be no standardized procedures for anyone to follow.

Straight away, this 'freestyle' approach to transitioning your customers from one department to another becomes problematic.

Because there is no one way to perform the handover, the lack of standardization can mean you end up with incomplete or inconsistent data being passed between teams.

Not only does this cause problems for your colleagues, but - perhaps more importantly - it can cause delays, errors, and frustration for your customers, jeopardizing the quality of their experience with you.

2. Communication Gaps

As a customer, nothing is more frustrating than having to repeat yourself multiple times.

Sometimes when an account is handed over to another team, they have no idea about the customer's requirements, and this makes things difficult for both customers and internal teams.

Ankit Aggarwal

Lead, CS Enablement @ MoEngage

If you're lucky, your manual handoffs will be done via emails, meetings, and spreadsheets, and everything is flawless.

However, realistically, most people aren't that lucky. Using emails, meetings, and spreadsheets is risky as it can often lead to errors, mistakes, and a lack of attention. This can cause gaps in communication and vital information to go missing.

This can force the customer to have to repeat themselves during every handoff or remind your colleagues of previously agreed details that they have no record of.

This is not a great look - and definitely not the type of customer journey or experience that you should be providing.

3. Time-Consuming

Bringing together all your customer's data manually is a time-consuming endeavor - that carries a high risk of errors.

Your teams should spend their time wisely by working with your customers and maximizing the value your company provides them.

They shouldn't have to waste their time battling with spreadsheets and clunky manual processes.

This inefficient way of working ultimately slows down the entire customer journey and has a knock-on effect on important metrics like Time-to-Value (TTV).

A good sales-to-customer success handoff process doesn't happen by accident. It takes both teams working together—and developing a well-thought-out process.

It makes more sense to put the CSMs in the background ahead of time before the deal is sealed. During the contract stage, assigning accounts to CSMs can also help accelerate the move from sales to customer success. It defines the point of contact for setting up the product from the customer's POV.

David Reid

Sales Director at VEM

4. Reduced Accountability

When handovers are done manually, it's easy for tasks, information, and outcomes to fall through the cracks.

If you don't have a system in place to help you assign and track responsibilities across your team, then accountability can become a real issue.

Information can be quickly lost for future reference by relying on handover calls alone, but people also tend to miss details or skim-read written notes.

Iram Cook-Monie

Head of Customer Success @ Mosaic Smart Data

What this means in practice is that if something goes wrong - and let's face it, a customer churns - you're going to have a challenge on your hands trying to pinpoint where the error came from and who was responsible.

By introducing a specialist system, you can quickly audit outstanding tasks, data, or other potential issues at a glance.

Not only does this help you to address issues with customers before they become serious, but this additional accountability tracking will help your team become more diligent as a result.

How a CSP Can Help Streamline Handovers

So, now you're familiar with some of the issues that manual handovers can bring to your customer journey, let's explore how a Customer Success Platform can help you improve things:

a. Centralized Data

One of the main advantages of using a Customer Success Platform is that it brings all your customer data - from first contact to ongoing support - together in one place.

Source: Custify app

This means that your CS team, and potentially your entire organization, can access the same information, updated in real-time.

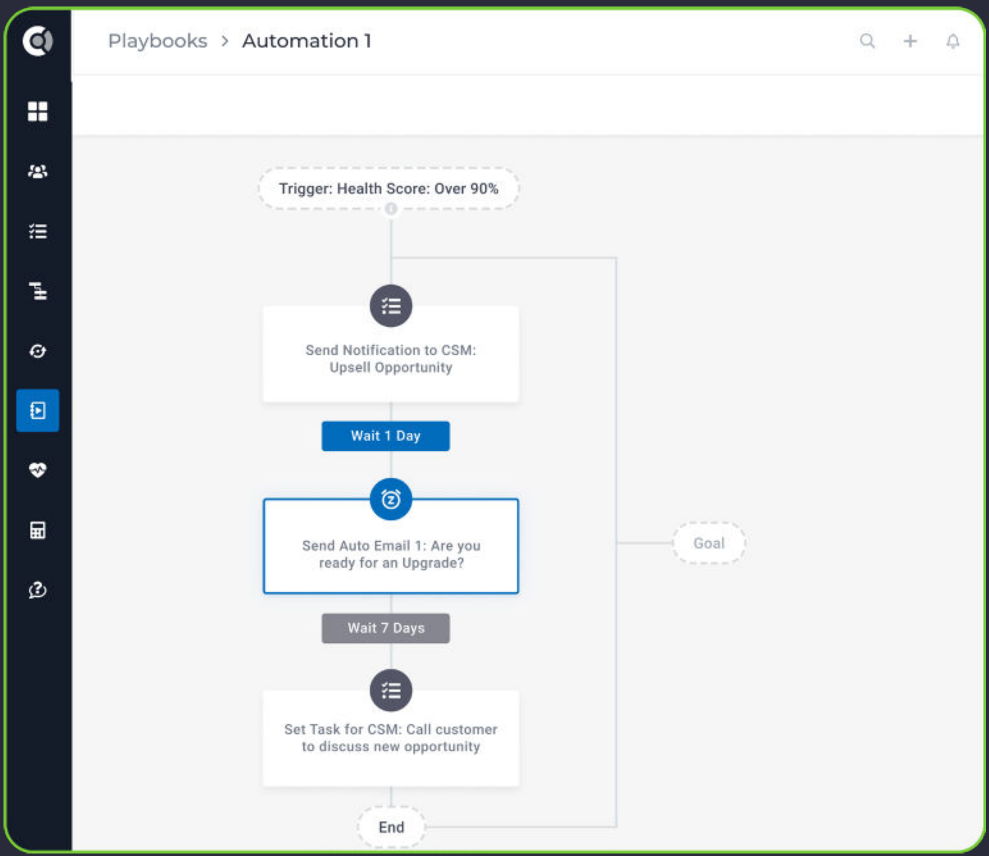
Not only does centralized data help you prevent many of the issues that come with manual handovers, but it also helps keep everyone on the same page so they can all better serve your customers.

Estimated time saved: 3 hours per CSM per week.

b. Automated Workflows

Handovers don't have to be a drawn-out or painful affair.

In fact, a CSP can automate many of the tasks involved in a handover and make it pretty painless to complete the process.



Source: Custify app

As an example, once a sale is closed, a CSP could pick up the information for that deal (via a CRM integration) and then automatically trigger a number of different actions, including:

- ✓ Assigning a CSM to the account,
- ✓ Sending a welcome email
- ✓ Scheduling an onboarding call

By automating a lot of these repetitive handover tasks, it allows you to make sure that no steps are missed, every customer gets a smooth and repeatable experience, and your CSM is freed up to do higher value work directly with the customers.

Estimated time saved: 2 hours per CSM per week.

c. Enhanced Collaboration

A key part of an internal handover is the collaboration between teams in order to make sure the customer's needs are met at all times.

Using technology like a CSP is a fantastic way to improve the way your teams work together in the best interests of the customer.

Typically, a customer success platform will boast features like:

- ✓ Shared dashboards,
- ✓ Commenting,
- ✓ Task assignment,
- ✓ Email reminders.

All of which are designed to allow for transparent and effective communication between teams to break down communication silos and connect the dots behind the scenes to make sure that your customers always receive a consistently excellent experience - and never get unsettled by the prospect of a handover.

Estimated time saved: 1-2 hours per CSM per week.

d. Accountability and Reporting

One of the key features of pretty much any software system is the ability to track what actions have been taken, by whom, and when.

Using the built-in analytics and reporting features in a CSP, you can easily track the progress and performance of all your handovers and monitor metrics like:

- ✓ Handover duration
- ✓ CSAT scores,
- ✓ Task completion

Having the ability to review exactly how each handover has gone gives you the opportunity to drill down into the data and identify further areas for improvement.

It also means you can have a data-driven approach to understanding the performance of your team members, which will boost accountability as a result.

Estimated time saved: 2-3 hours for a CS leader per week.

CHAPTER II

Streamlining Quarterly Business Reviews

It doesn't matter whether you call them QBRs (Quarterly Business Reviews), EBRs (Executive Business Reviews), or just plain old Account Reviews.

Whatever you call them in your business, you know that they can be time-consuming to prepare, frustrating to organize, and that the mere mention of them can send shivers down the spines of your CSMs.

The drag with QBRs often boils down to scrambling for data and wrangling slides.

Jeff Breunsbach

Director, Corporate Marketing @ Higher Logic / Co-Founder @ Gain Grow Retain

That said, QBRs are an essential part of most customer journeys - so there is no getting away from them.

If you're unfamiliar with the concept, they're essentially a regular review meeting with your customer to look at their performance and progress with your product, as well as setting mutually agreed goals and discussing strategies.

If you don't make the most of these QBR meetings, they can quickly become a burden for your customers and a time drain on your CSM.

So, to help you and your CSMs save time and ensure you're preparing a QBR that has value for your customers, we've outlined some common time-sapping challenges you might be facing and solutions you can implement with CSP technology.

Why QBRs Can Be Time-Consuming

1. Coordination and Scheduling

At this stage, you know you need to do a QBR with one of your customers.

This might be because you've noted it somewhere, but because of your messy manual processes, there's a risk that your customer might have asked you for one!

Either way, the challenge now is for your CSM to coordinate a time that works well for everyone involved. Navigating time zones, schedules, and conflicting priorities means that this can become something of a logistical nightmare.

Not only is this frustrating for your CSM, but it's time-consuming for everyone involved and isn't the smooth and easy experience you should be aiming for with your customers.

2. Data Aggregation

OK, so after much back and forth, your CSM has set up an appointment for a QBR next week. Sounds great, but what are they going to talk about?

It is important to gather the data the customer actually cares about and relates to the customer's internal metrics - rather than vanity metrics.

James Stuart

Senior CSM at Hackajob

To make sure you're adding value to your customers, you're going to need to take a data-driven approach.

The trouble is that in order to get a total view of your customer's experience with your product so far, you'll need to gather intel and insights from multiple sources like:

- ✓ CRM systems
- ✓ Support ticket systems
- ✓ Customer surveys for things like CSAT and NPS
- ✓ Product usage data

Doing this manually will likely take your CSM hours to complete. It's not an effective use of your CSM's time.

3. Slide Deck Preparation

Once your CSM has spent way too much time battling your internal data silos to track down all the various strands of information you hold about your customers - they're going to need to make it presentable.

Typically, this involves preparing a slide deck to turn all the raw data into an easily digestible format.

As a result, this slide deck needs to be jam-packed with things like:

- ✓ Graphs
- ✓ Charts
- ✓ Visual breakdowns of various KPIs

All of which tend to be incredibly time-consuming to prepare.

Again, you have to ask yourself, is your CSM's time being used effectively if they need to spend hours pulling together a slide deck?

Making QBRs More Efficient With Technology

a. Automated Data Collection

One of the immediate benefits of using CSP technology to help you with your QBR preparation is automated data collection.

You can easily integrate a customer success platform with any of your other systems, including:

- ✓ CRM
- ✓ Support portal
- ✓ Survey tools
- ✓ Platform analytics

This integration then gives you instant access to real-time data from across your technology infrastructure - helping data silos to become a thing of the past.

> **More than 19 in every 20 CX leaders have invested, or plan to invest, in data integration, data integrity, or data enrichment technologies.**
>
> **CX Today**

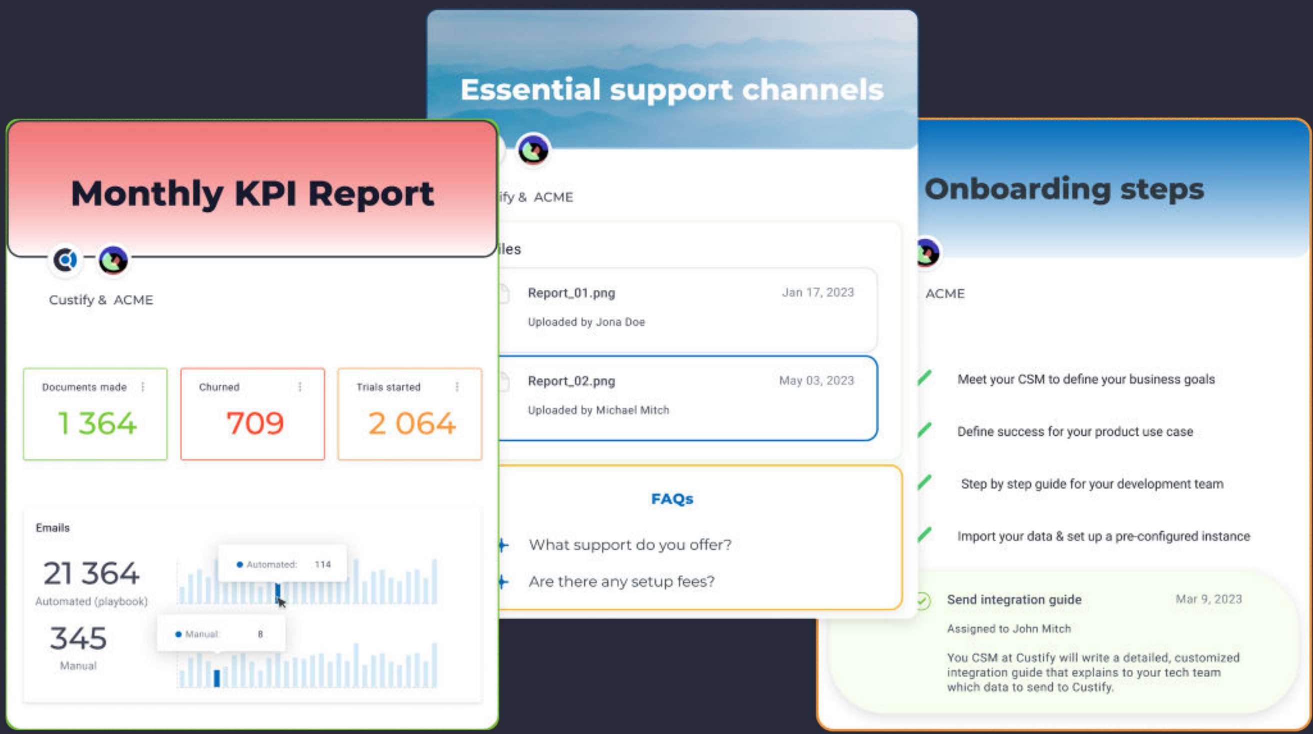
Because all the data you'll need for your QBR preparation - and lots more besides - is all available at the click of a button in your CSP, it means your CSMs can save bundles of time by aggregating data automatically and building a 360-degree view of the customer in seconds.

Estimated time saved: 2-3 hours per CSM per week.

b. Pre-Built Templates

Not only can a Customer Success Platform help to take away the pain of sourcing the various strands of data you need to produce a QBR slide deck... but it can also help you to produce the actual slide deck, too!

This is because many CSPs feature pre-built QBR templates that can be further customized to fit your specific needs.



These templates will often come ready to go full of pre-configured charts and graphs, allowing you to plug in your data easily - and save a bunch of time as a result.

Having ready access to pre-built QBR templates that can easily sync with all your customer data not only speeds up the slide deck preparation process but also ensures your CSMs will deliver a consistent and professional presentation every time.

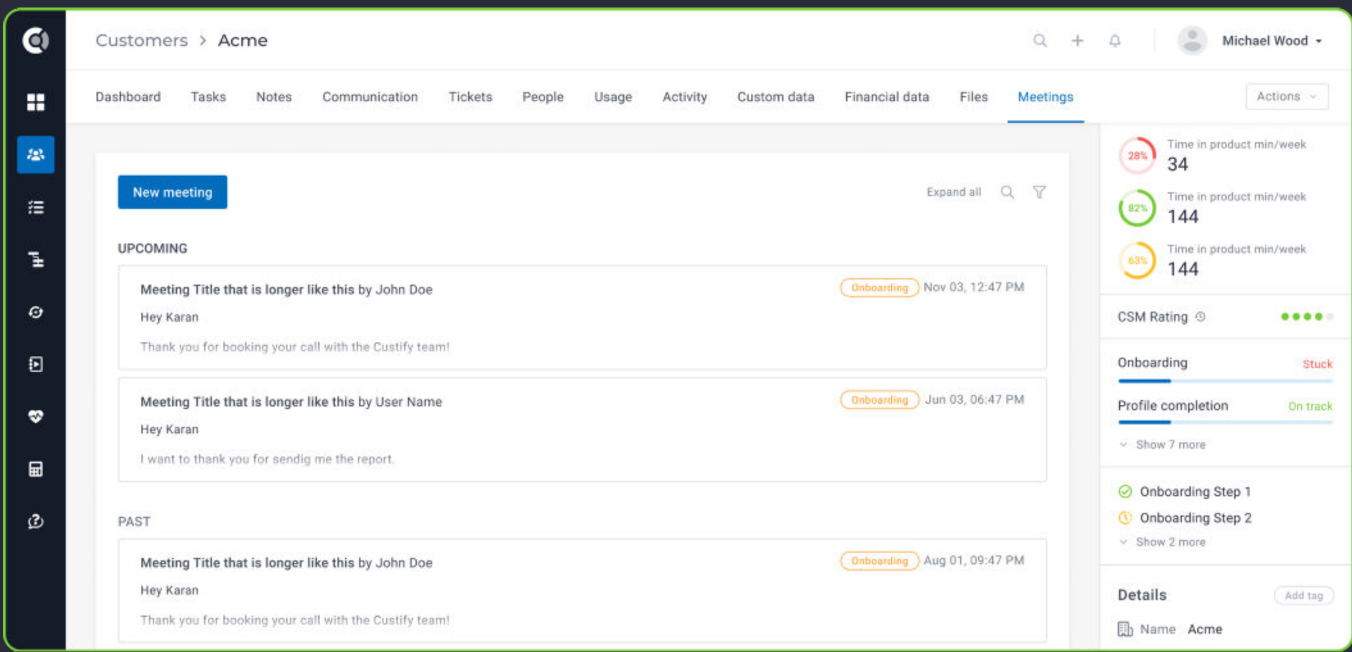
Estimated time saved: 7 hours per CSM per week.

c. Scheduling Assistants

We all know how frustrating it can be to play 'meeting tennis' with customers - going back and forth between your calendar and theirs until you find a winning time and date.

Thankfully, some of the more advanced customer success platforms can help you and your team to overcome this scheduling nightmare. By including features like:

- √ Calendar invites,
- √ Meeting reminders,
- √ Rescheduling options,



Source: Custify app

CSPs take the hassle out of finding a time that works for everyone - and offer a more streamlined and professional experience for your customers.

Estimated time saved: 1-2 hours per CSM per week.

d. Quick Collaboration & Approval

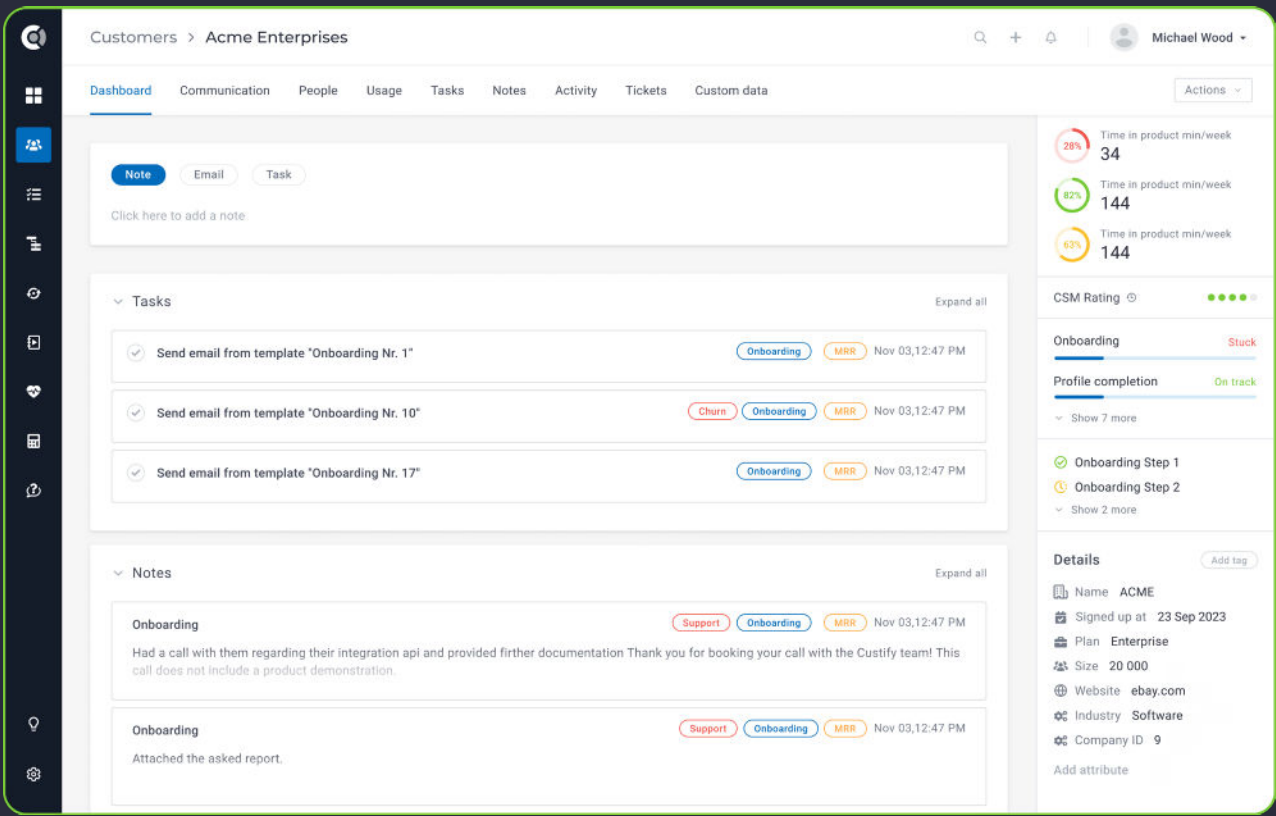
Because everything can be stored centrally in a customer success platform, it gives you the option of adding a collaboration or approval workflow to your QBR processes.

Whether you want to get the insights of an implementation manager who recently worked with the customer, or you want a senior CS team member to sign off on freshly prepared slide decks, CSPs can make this happen in just a few clicks.

Estimated time saved: 1 hour per CSM per week.

e. Actionable Insights & Next Steps

Because customer success platforms don't just give you a snapshot of the past - they can also predict future outcomes as well - they give you a powerful set of insights to help with your QBR planning.



Source: Custify app

By highlighting trends, identifying potential opportunities, and pinpointing potential risks, your CSP will help your CSMs feel better equipped to deal with more strategic conversations - ultimately adding more value to the experience for your customers.

Estimated time saved: 4 hour per CSM per week.

CHAPTER III

Improving Communication with Customers

We're sure you'll agree with us on this: effective communication is the key component of any successful customer relationship.

It's not just about conveying information; instead, communication is about building trust, setting expectations, and guiding your customers through their journey with your product or service.

Effective communication is the bedrock of trust and the GPS for customer expectations. But as you scale, keeping it real and personalized becomes a Herculean task. It's not just about keeping the conversation going; it's about being relevant and responsive, all while juggling a growing customer base.

Irina Vatafu

Head of CS at Custify

The Role of Communication in Customer Success

As we've just talked about, communication is an essential part of customer success management and the overall success of your customer journey - without it, your customers will become confused, frustrated, and unlikely to stick around.

To avoid this, let's look at some of the outcomes your customer communication needs to achieve.

1. Building Trust

Trust is the cornerstone of any successful relationship, and it's certainly no different when it comes to a relationship between a CSM and a customer.

Clear and effective communication builds trust by keeping your customers informed, setting clear expectations - and delivering on those expectations. as well as being open and honest about potential challenges or issues.

2. Encouraging Engagement

You can't expect your customers to want to engage with you, if you're not engaging with them.

Engagement is not a one-time or one-way process - it's something you need to do consistently in order to maintain a healthy relationship with your customers.

This means you should be regularly communicating with your customers - both individually and at scale - both about your product in general, as well as their specific needs or use cases.

It's important to note that regularly and consistently doesn't mean you need to speak to them every day or every week -but you should be able to find a suitable cadence of communication based on the size and scale of your customer and the stage they're at in their journey with you.

Putting in the groundwork here and having a well-oiled communication channel with your customers means your customers are more likely to be receptive to opportunities for upsells and cross-sells, as well as being willing to offer feedback or stick with you through any difficult issues.

3. Problem-Solving and Support

Of course, we all know that customer success isn't customer support.

However, your customers will inevitably have questions for you from time to time, which, in your capacity as a 'trusted advisor,' your CSMs should be prepared to help with.

Instead of bluntly referring your customers to the support team, washing your hands of the issues, and never looking back, you can do things differently.

Working with the customer in a timely, empathetic, and solution-oriented way will help you strengthen your bond and enhance the relationship.

This doesn't mean you need to personally answer every support request that lands with you, but it does mean you should be prepared to help the customer and oversee the successful resolution of that issue.

4. Customer Retention

This is the big one - the ultimate outcome of all your hard work as a CSM or CS team.

Without effective communication, your chances of successfully retaining your customers in the long term are almost zero.

When it comes to retention, some factors are completely out of your control as a CSM - including things like market conditions, internal budgets, and personnel changes.

However, by actively maintaining effective communication channels and proactively addressing any potential issues, while genuinely listening to customers' needs and using their feedback to improve your products and services, you significantly increase your chances of retaining and expanding your customer base.

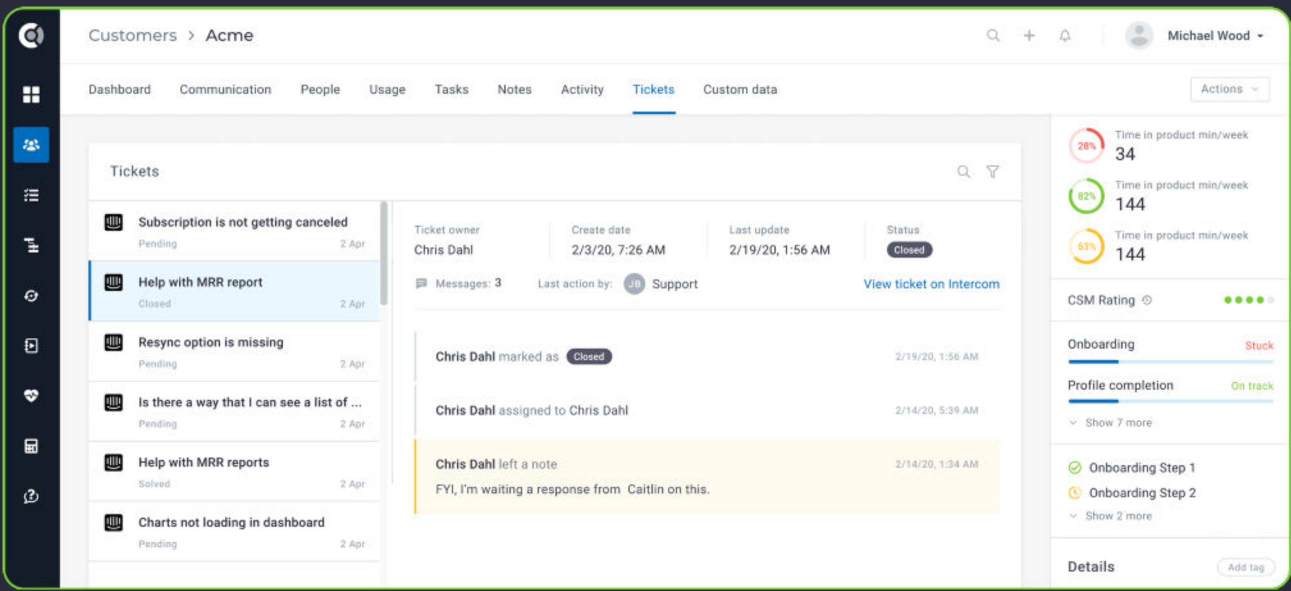
Improving Customer Communication with Technology

OK, so we won't keep going on about how great communication with your customers is. Instead, let's change tack and look at how you can leverage the power of CSP technology to transform the way you communicate with your customers.

a. Centralized Communication

Customer success platforms store all your customer-related communication in one place, helping you to break down data silos and communicate more effectively with your customers.

As a customer, it's extremely frustrating when you have to repeat yourself to different members of a company who seem oblivious to previous discussions you've had.



Source: Custify app

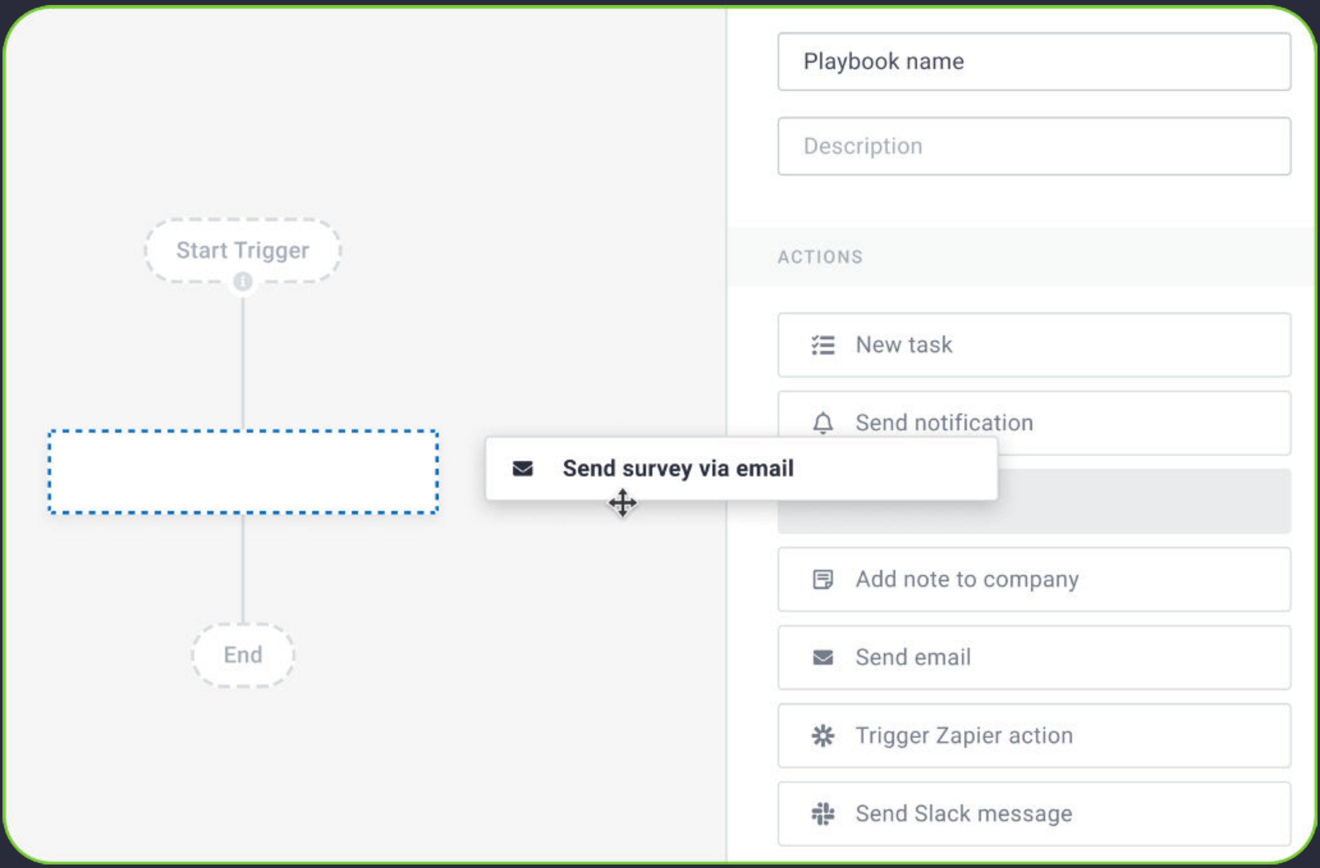
CSPs can store all customer emails, sales information, chat messages, support tickets, meeting notes, and more in one place. This means both you and your entire team have access to the same information at the same time.

As a result, the experience for your customers should be completely flawless, with consistent and well-informed communication every time.

Estimated time saved: 3-4 hours per CSM per week.

b. Automated Messaging

You don't have to write every email from scratch in order for it to be an effective way to communicate with your customers.



Source: Custify app

Throughout the customer journey, there are going to be countless common milestones, events, or other reasons to communicate with your customers. These could be things like:

- ✓ Welcome emails
- ✓ Product updates
- ✓ Renewal reminders
- ✓ Meeting requests

Using a CSP will allow you to automate these more routine or repeatable messages.

Tech isn't a replacement for human touch, but it's a fantastic augment. I've used automation platforms for milestone check-ins and feedback requests. It ensures consistent touchpoints while freeing up time for more meaningful, personalized interactions.

Jeff Breunsbach

Director, Corporate Marketing @ Higher Logic / Co-Founder @ Gain Grow Retain

Not only will this save your CSMs precious time, but it will ensure that no customer is ever forgotten about and that the message remains consistent across the board.

Of course, these messages don't have to appear as generic and soulless. You can set a variety of personalization and automation parameters around these messages so that they always feel pertinent and timely to the customer.

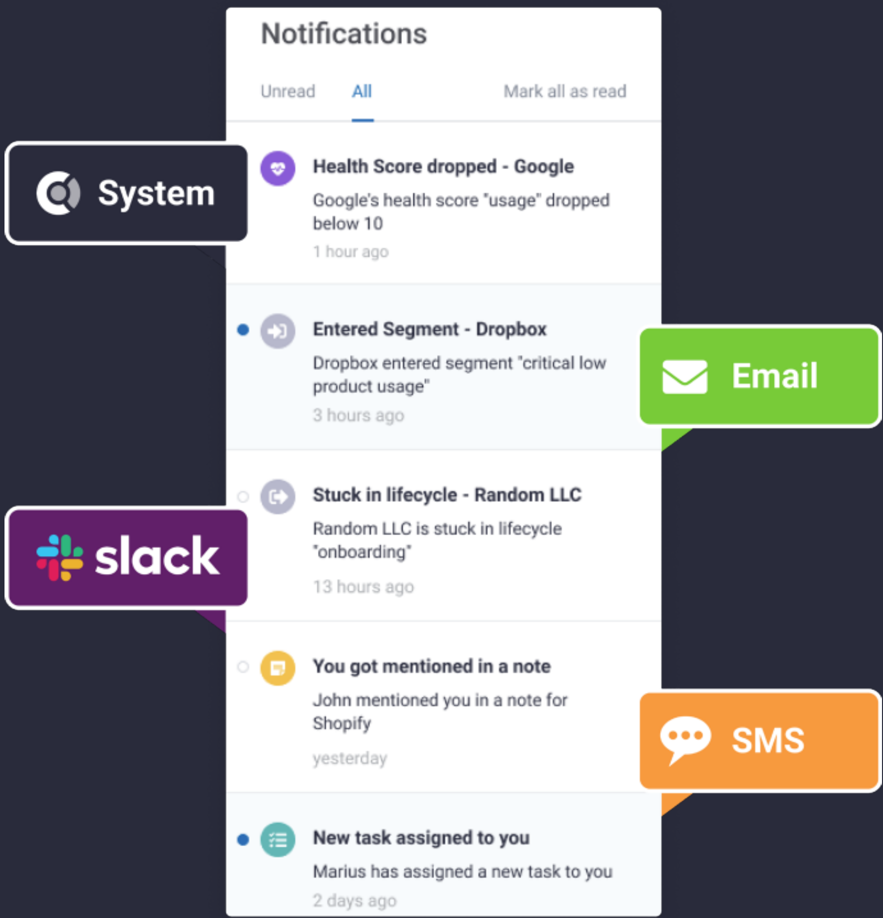
Estimated time saved: 6 hours per CSM per week.

c. Real-Time Notifications

They say that knowledge is power - and that forewarned is forearmed.

These old adages are absolutely right, especially when it comes to customer success.

CSMs need as much information at their fingertips as they can get, in order to make sure their customer accounts remain healthy at all times.



By making use of real-time notifications available with a customer success platform, CS teams can quickly learn about any significant changes in their customer's behavior.

These changes could be them starting to use a new feature, submitting a number of support tickets, or even changes in their usage patterns.

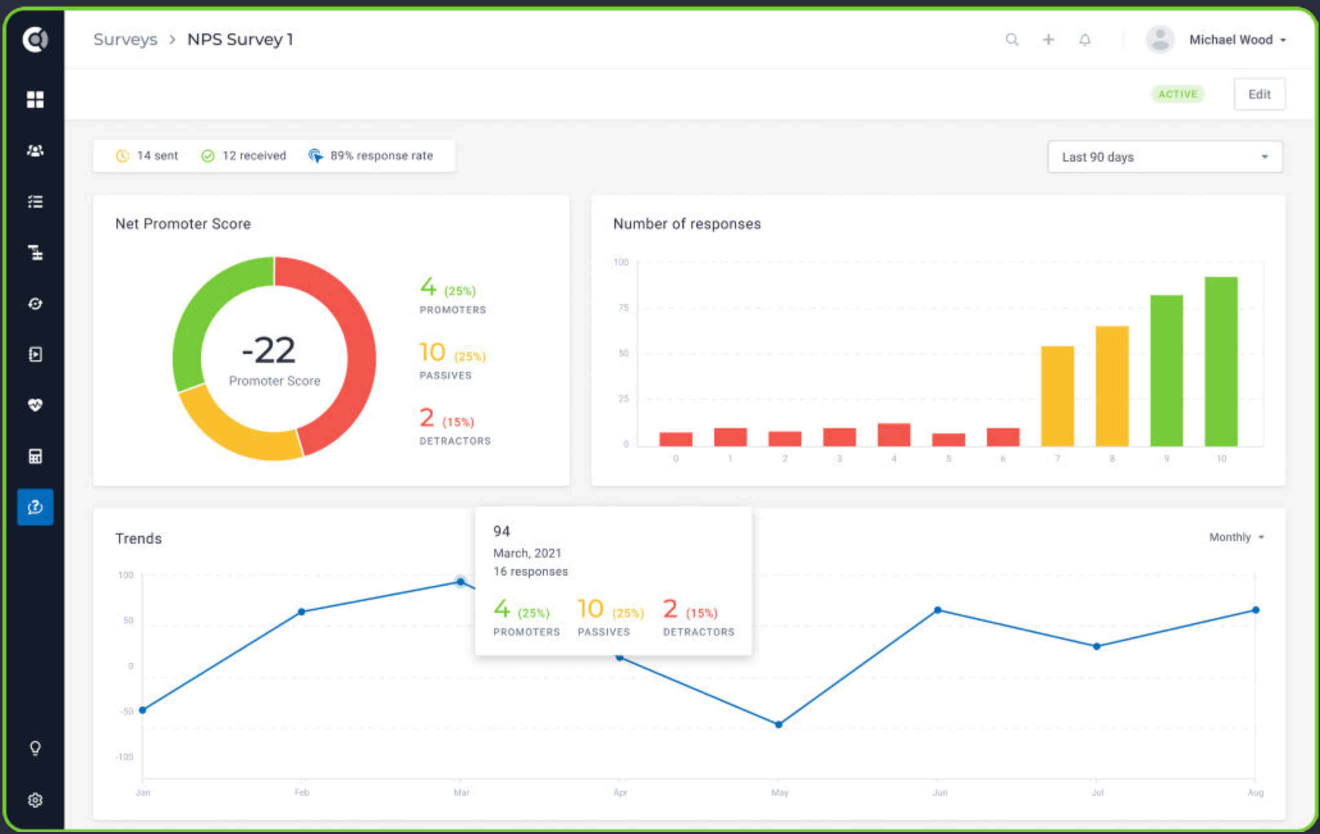
By receiving notifications of these events, CSMs can proactively reach out to the customer and offer help and guidance where appropriate to prevent potential issues from occurring.

Estimated time saved: 3-4 hours per CSM per week.

d. Customer Surveys

Of course, communication shouldn't be a one-way street.

Your customers need a chance to be able to share their thoughts on the product, the service they receive, and how it affects them.



Source: Custify app

This is where you can leverage in-built customer survey tools within your customer success platform, to automatically collect Net Promoter Score (NPS) or Customer Satisfaction (CSAT) survey data from your customers

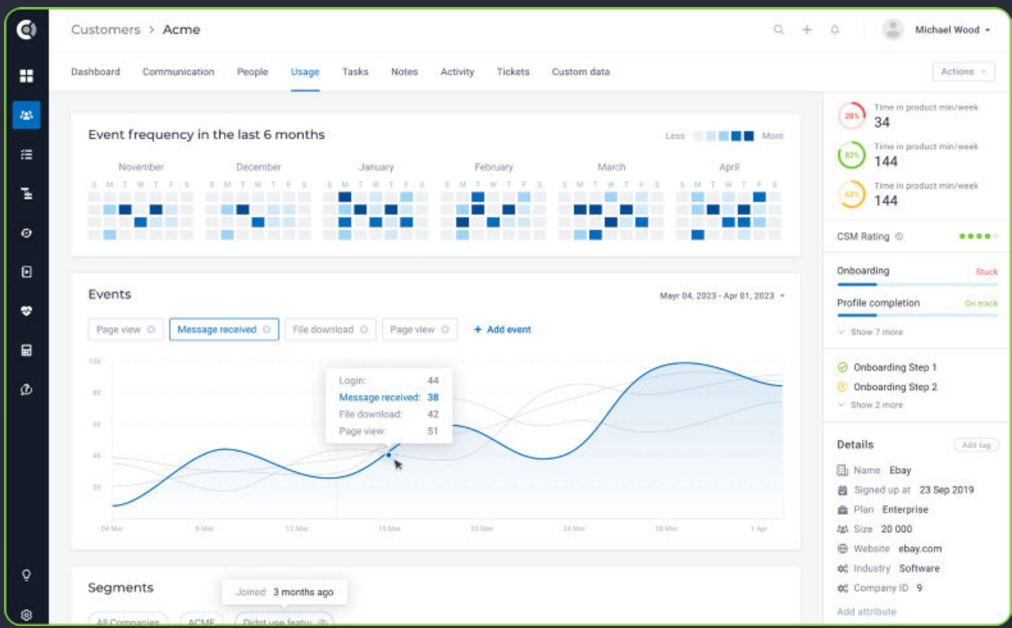
By gathering this information at points that make sense in your customer journey, you'll be able to produce insights into your customer's overall experience so far, and make the appropriate intervention to help improve things where necessary.

Estimated time saved: 2 hours per CSM per week.

e. 360 Customer View

Clearly, it’s very important to be able to intervene when customers are facing issues, but the best CSMs should be able to work proactively before the customer is even aware they have an issue.

One way they can do this is by using a 360-degree customer view within their customer success platform.



Source: Custify app

This will give them up-to-the-minute insights into any number of indicators including:

- ✓ Product Usage
- ✓ Product adoption
- ✓ Health scores
- ✓ Where they are in the customer lifecycle
- ✓ Specific success metrics for your product

This information can then be used to automatically trigger a playbook of actions for your CSMs to follow. In some cases, the actions will be further automated - for example, a check-in email - in other more serious circumstances, the CSM may wish to follow up in person.

Either way, having access to a 360-degree view of the customer gives you and your CS team a plethora of options for enhancing your customer communication.

Estimated time saved: 5 hours per CSM per week.

CHAPTER IV

Personalizing the Customer Experience

You've heard it before - "the customer is king".

Some customers even think they are different from the rest and deserve special treatment.

Instead of your CS team getting frustrated, maybe it's worth considering that these customers might be right?

> **Personalization drives performance and better customer outcomes. Companies that grow faster drive 40% more of their revenue from personalization than their slower-growing counterparts.**
>
> **McKinsey**

Customers are no longer satisfied with generic 'one size fits all' solutions and interactions.

Instead, your customers demand personalized experiences that are based on their unique needs and preferences.

The key point for setting up your customer for success while using personalization strategies is during onboarding. So, let's look at why personalization matters so much during onboarding and how you can leverage technology to help you with it.

Why Personalization Matters in Customer Onboarding

1. Setting the Stage for Success

Onboarding is one of the first real touchpoints with your product and service - outside of sales, obviously.

So, it's an ideal time to set the stage for your customer's ongoing success with you.

Personalizing the experience is the ultimate way to ensure that customers feel valued and understood right from the beginning.

2. Increasing Engagement and Adoption

The chances are that as soon as the customer smells a 'generic' approach to onboarding that doesn't accommodate their needs, they will disengage.

Based on the data that we have, CSMs get a birds-eye view of the customer, helping us deliver a hyper-personalized experience to customers.

Ankit Aggarwal

Lead, CS Enablement @ MoEngage

This disengagement could be small at first - perhaps not paying attention during a session or not prioritizing future meetings with you - but over time it's almost certain to lead to churn.

This is where a personalized onboarding experience can really become a game-changer for you.

> **Leaders in personalization achieve outcomes by tailoring offerings and outreach to the right individual, at the right moment, with the right experiences.**
>
> **McKinsey**

By genuinely showing customers your commitment to assisting them in resolving their issues instead of offering generic solutions, you will not only increase their engagement, but also ensure their long-term adoption of your product.

3. Reducing Time-to-Value (TTV)

As you well know, one of the key metrics you should be focused on during the onboarding process is TTV - or time to value.

Instead of guiding your customers through a soul-crushing tour of every generic feature or use case for your product - we've heard of basic training for a niche-specific SaaS taking a solid 4-weeks! - it's time to get personal with them.

By focusing on the features and benefits that are a great fit for your customer and their needs, you can help them achieve their goals more quickly - which will lead to increased satisfaction and loyalty overall.

4. Building Trust and Loyalty

Everyone likes to feel listened to and understood.

If you continue to persist with a 'one size fits all' approach, it will alienate your customers.

Instead, using a personalized onboarding experience shows your customers that you understand their specific needs and challenges - and actually care about helping them solve them.

This dedication to their cause builds trust and loyalty, making it more likely that the customer will stay with you in the long run.

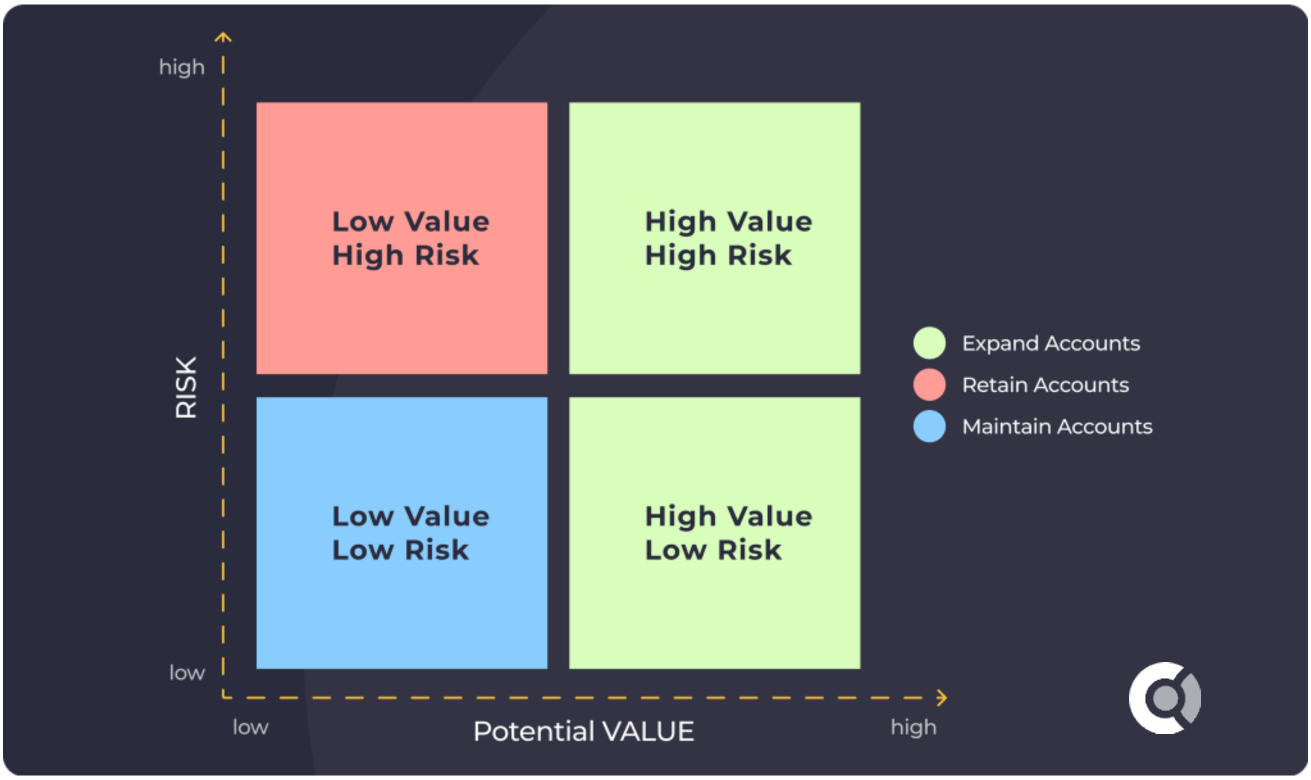
How Technology Can Help You Personalize Onboarding

> Companies that automate onboarding tasks register **16%** better retention rates.
>
> 99Firms

a. Customer Segmentation

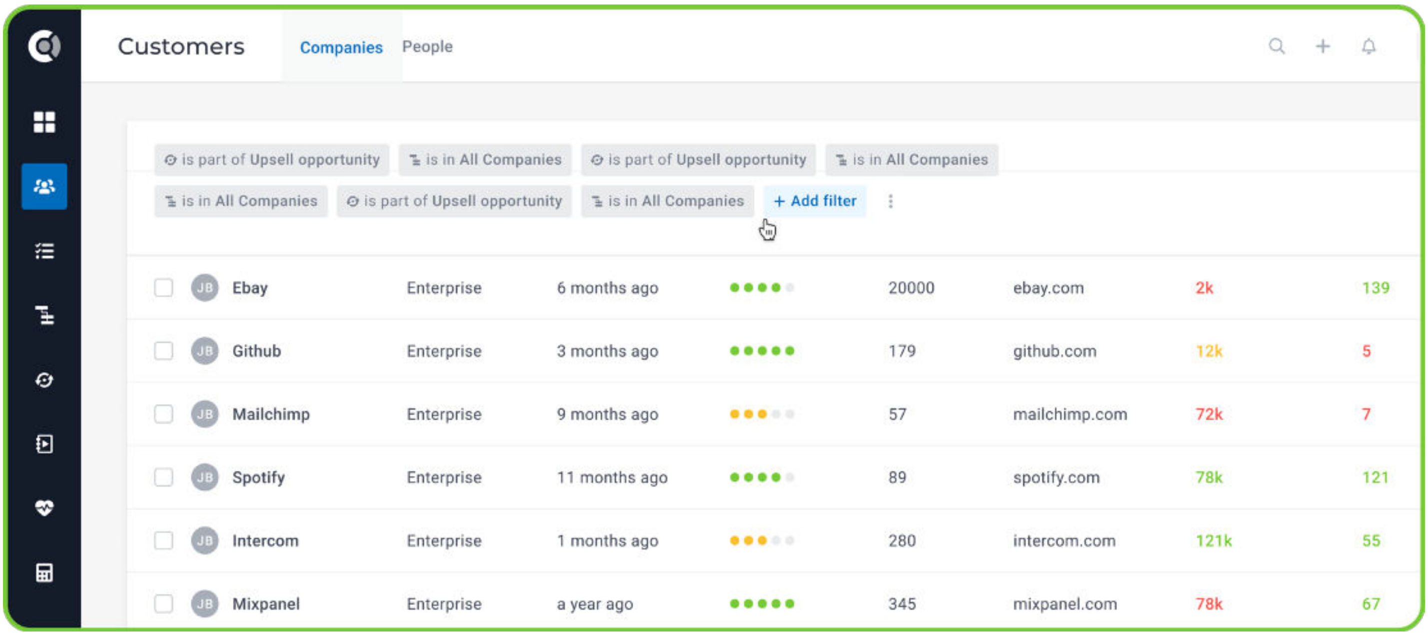
One of the first steps in personalization is understanding who your customers are.

Customer Success Platforms will often include analytics tools that allow you to segment your customer base using options like industry, company size, or usage behavior.



Having a customer journey that caters to specific ICPs (ideal customer profiles) and target segments gives you the chance to get ahead of the curve and plan what the common issues are for a company of ‘X’ size in ‘Y’ industry.

This helps you to semi-personalize the experience before the customers even mention their specific needs or issues.



Source: Custify app

Laying this groundwork early will help the customers know they’ve chosen the right vendor and feel comfortable that you’ll set them up for success during onboarding.

Estimated time saved: 3 hours per CSM per week.

Knowing your customers is key to success. Imagine discovering most users love a specific feature you offer. That’s not just a clue; it’s a roadmap directing your energy and resources.

Irina Vatafu

Head of CS at Custify

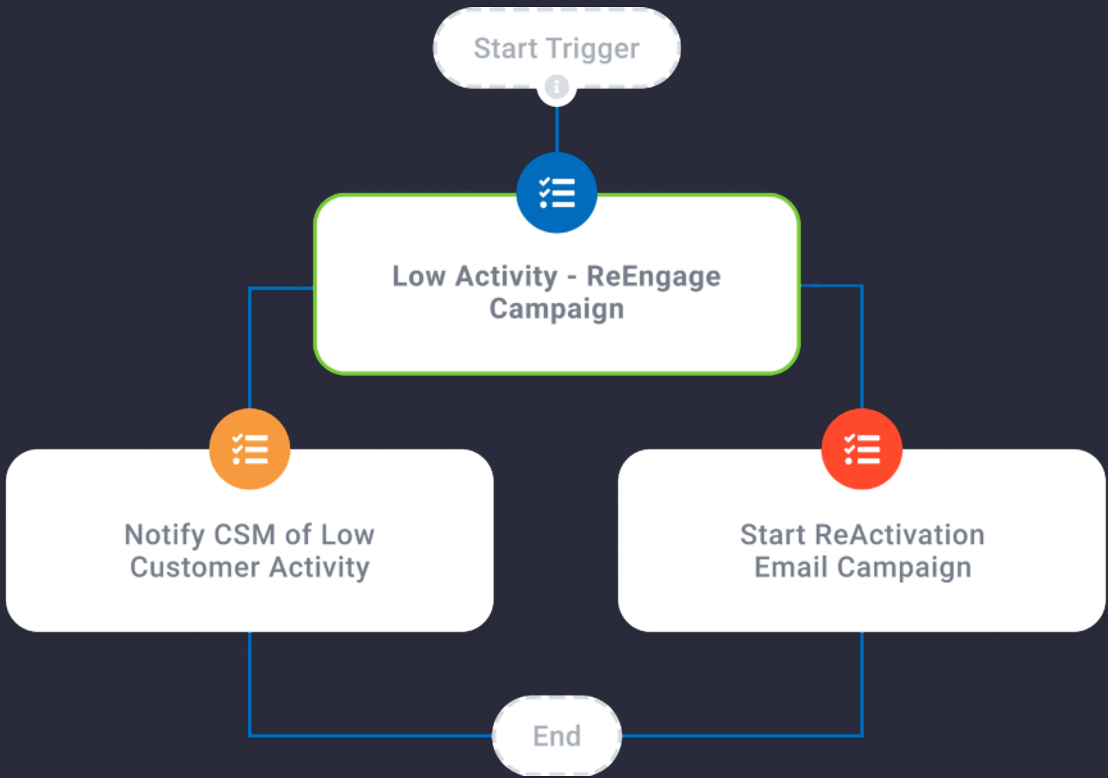
b. Automated Workflows

Of course, personalization doesn't just have to mean configuring the implementation of your product to perfectly meet your customer's needs.

It can also mean personalizing their overall experience with you based on their behavior.

Automated workflows are a great example of this.

Imagine for a second that your customer hasn't logged in and used your product since you did a training session with them last week. We know it's difficult to imagine because your training is great - but work with us here.



To solve this problem and resume the implementation, you can set up your customer success platform to automatically send a focused email with resources to assist them in starting.

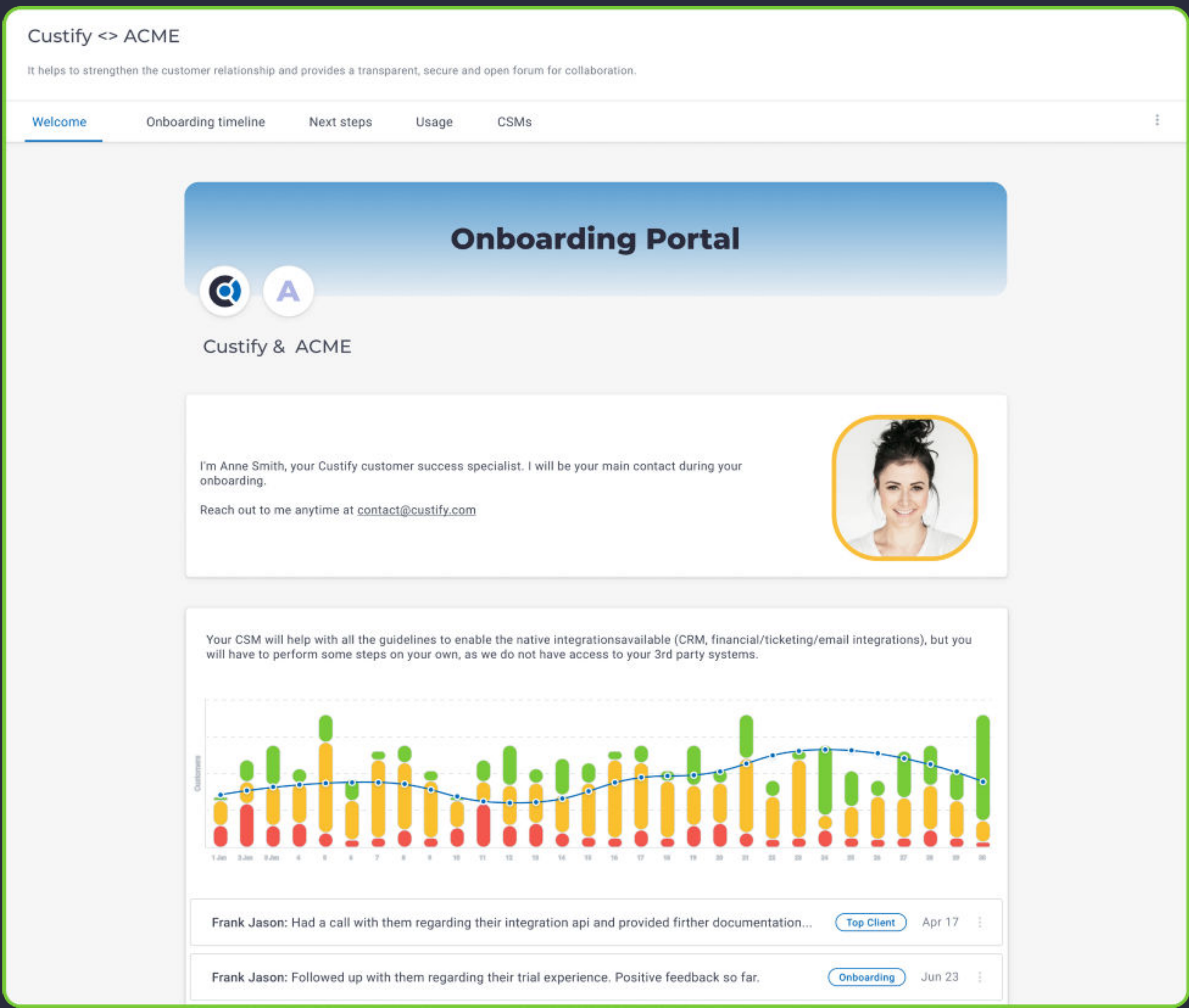
What makes this personal? Well, not every customer will get this. Your customers who have disengaged will - so it's a personalized event based on their behavior.

Estimated time saved: 5 hours per CSM per week.

c. Collaborative Onboarding

One of the key ways to get your customers engaged in the implementation process is transparency and genuine partnership.

Your customers want to know what is happening at every stage of the implementation project and that they are involved in decision-making.



Source: Custify Portal

Some customer success platforms have a customer collaboration portal. It helps make the implementation process more transparent and collaborative.

This change in approach enables you to not only keep customers informed but to genuinely take their perspective onboard during each phase of implementation, helping the whole process to feel more personalized as a result.

Estimated time saved: 3 hours per CSM per week.

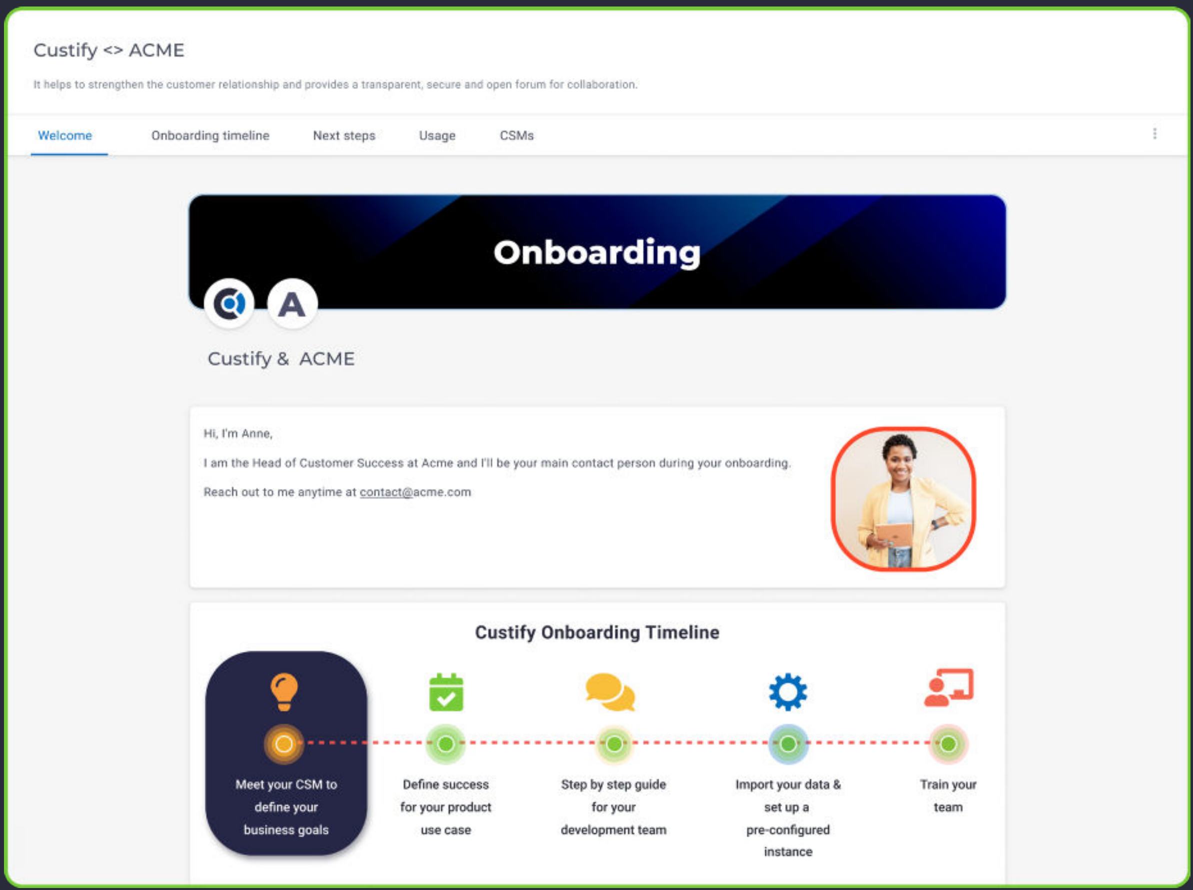
d. User Journeys and Milestones

Every customer is different. There, we said it.

As much as you want every customer to follow your exact 'cookie cutter' journey that would make all implementations super efficient and a breeze to manage - sadly this isn't a reality for most implementation teams.

Customers have conflicting priorities for their time to work with you.

Customers have other internal projects running in conjunction with your implementation, which will often be a dependency for you to finish on time.



Source: Custify Portal

To deal with the uncertainty, you need to map out a personalized user journey that addresses the specific issues and leads to a satisfactory outcome for your customer.

Thankfully, a dedicated CSP makes this incredibly easy to manage and gives you countless options to adjust, adapt, and personalize your onboarding experience for them.

Estimated time saved: 2 hours per CSM per week.

CHAPTER V

Enhancing Customer Success Through Data

We all know how valuable data is.

There are laws protecting it - and teams dedicated to managing it.

Data has become so valuable because it can be used to shape strategy and inform decision-making in business.

Put simply, using data effectively directly contributes to the profitability of a company.

Data is important for all departments in your organization, but using data correctly is especially crucial for customer success.

This is because, in CS, data can provide incredible insights into customer behavior that can help you predict churn and identify expansion opportunities.

However, having data is one thing; knowing how to use it properly is another.

So, let's delve into the role that data plays in customer success and explore how Customer Success Platforms can help you make the most of your customer data.

The Role of Data in Customer Success

1. Identifying Trends and Patterns

As a CS leader, you should be encouraging your team to leverage data to spot opportunities with their customers.

Simply taking the time to review customer data can reveal trends and patterns that might otherwise go unnoticed.

Data is the backbone of customer success. By harvesting it, we can spot patterns, anticipate needs, and predict challenges.

Jeff Breunsbach

Director, Corporate Marketing @ Higher Logic / Co-Founder @ Gain Grow Retain

These trends can be both positive and negative, for example:

- ✓ A sudden drop in product usage could indicate an issue that needs immediate attention.
- ✗ Meanwhile, an uptick in engagement could signify an opportunity for upselling or cross-selling.

In order for a CSM to be proactive, it's important they can read the signs of what's coming before a customer even mentions it. This is why using data is such a crucial skill to master in customer success.

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2. Measuring Customer Health

What should go into an overall health score? Is it accurate? Should I rely on it?

The truth is, that while some people like to second-guess a defined health score, using data to understand the overall health of your customer should never be considered a bad thing.

The way data is combined to determine an overall 'score' may vary depending on interpretation. But most people will focus on specific key metrics to understand the current health of their customers. These key metrics can include:

- Net Promoter Score (NPS)
- Customer Satisfaction (CSAT)
- Product usage metrics
- Customer Lifetime Value (CLV)
- CSM sentiment

Neglecting to regularly monitor your customers' product usage or gather their feedback through surveys is a guaranteed recipe for unpleasant surprises when renewal time arrives. So, never underestimate the power of data in CS.

3. Personalization

As we talked about in the previous chapter, personalization is one of the key approaches CS teams need to take in customer success management.

Personalization goes beyond simply inserting someone's name into an email template. It involves improving the customer's experience with your product and service.

Leveraging data is a key aspect of developing personalized experiences for your customers, with examples including:

Customer segmentation:

using your existing data to understand what customers in different segments are likely to need - before they even mention it.

Automated workflows:

data allows you to understand customer behavior, so you can develop automated workflows to help keep your customers engaged.

Custom user journeys:

understanding your customers' habits, timeframes, and behaviors is crucial for creating a user journey that fits their needs and aligns with your project goals.

4. Proactive Decision-Making

One of the fundamental laws that all CSMs abide by when they enter the world of customer success is to be proactive and not reactive. And **when it comes to proactive decision-making in CS - data is your friend.**

Instead of idly waiting for customers to approach you with their concerns, you can learn from the practices of top-notch Customer Success Managers. These professionals proactively employ data to predict and address issues before they become major problems.

Proactively improving the overall customer experience is an effective way for CSMs to directly contribute to increased expansion and retention rates.

How Technology Can Help You Gather and Interpret CS Data

By this point, you're probably nodding your head and agreeing that your CSMs should be using data pretty much all the time.

The only downside to that - and we agree with you on this - is that manually trawling through data is a hugely time-consuming task.

And, let's face it, if there's one thing that CSMs don't have a lot of - it's time.

So, it's essential to understand how your CS team can use customer success-focused technology to improve data gathering and interpretation.

a. Data Aggregation

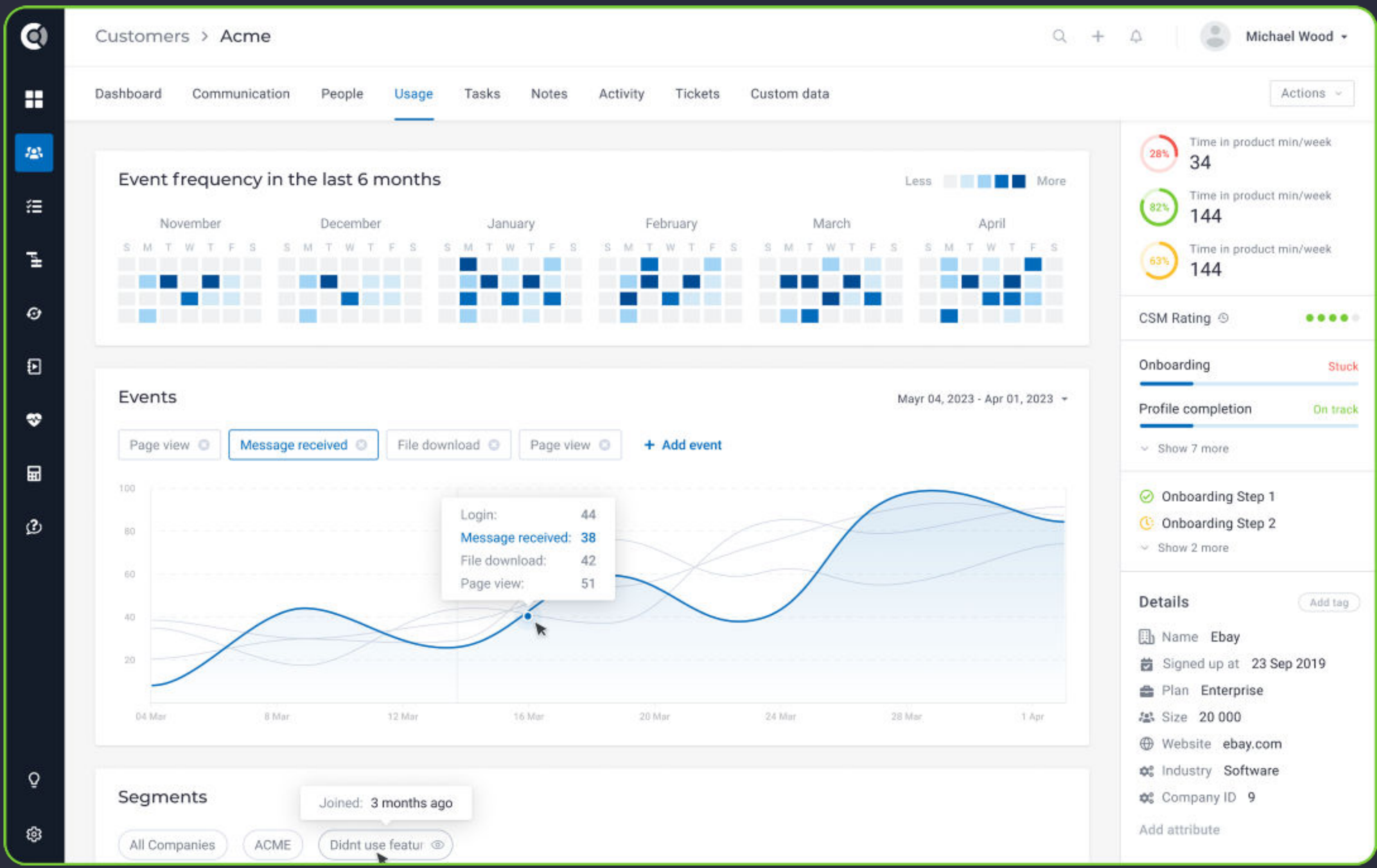
We've talked about this already in previous chapters, but we'll talk about it again: navigating data silos is a major challenge for CS teams.

Data is gold, but too much data becomes quickly undigestable. Focus on the data that matters.

Elisabeth Courland

CS Ops at Agorapulse

With the help of a specialized customer success platform, you and your CS team can bid farewell to wasting hours hunting down and sifting through data from various sources.



Source: Custify app

This is because the best CSPs will integrate with the rest of your tech stack and automatically aggregate a variety of different data types for you, including:

- √ CRM sales data,
- √ Support ticket data
- √ Marketing data,
- √ Product usage data
- √ Emails & meeting notes
- √ And so much more

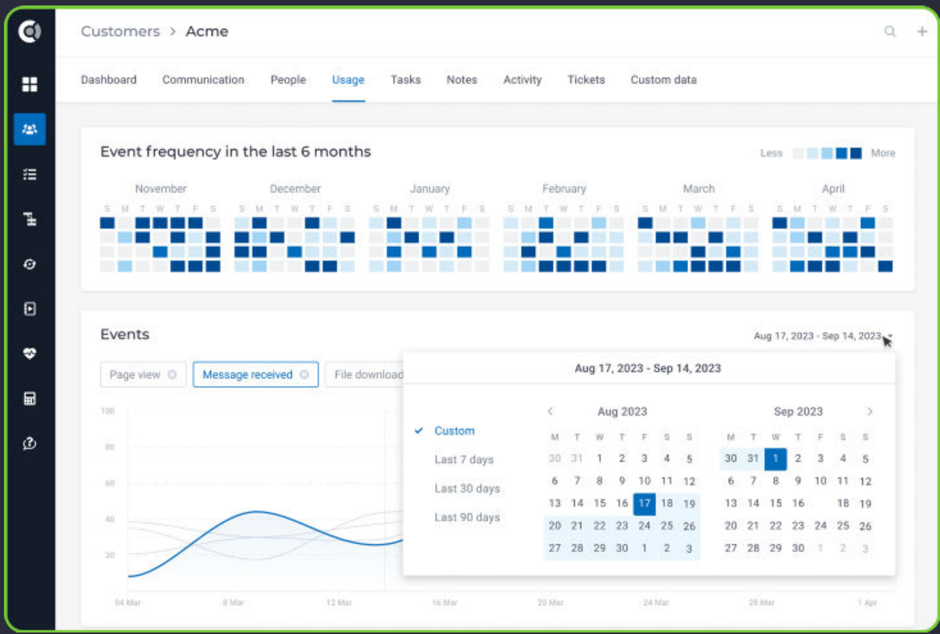
All of which can be used by the CSP to provide you and your team with a centralized dashboard that provides a full 360-degree view of your customer, helping you to gain important insights at a glance.

Estimated time saved: 5 hours per CSM per week.

b. Real-Time Analytics

Since your customers anticipate your CSMs to have a deep understanding of their accounts, relying solely on historical data can only provide limited assistance.

To counteract this, CS teams are leveraging real-time data and data analytics to help them get immediate insights into the performance of their customer accounts.



Source: Custify app

As well as gathering data from a wealth of different 3rd party sources, customer success platforms can also provide you and your team with real-time analytics to monitor customer behavior and usage - both positive and negative.

Once the CSP has identified an event that your CSMs should be told about, the system can issue an alert to keep your CSM informed.

From there, one of two things can happen:

1. The CSM uses the information to reach out to the customer and help rectify the issue.
2. The customer success platform uses that information as a trigger to run a playbook to help the customer automatically.

Both are valid options that are designed to help the customer. Automation can be implemented based on issue severity, allowing CSMs to decide when and where to intervene manually.

Estimated time saved: 5 hours per CSM per week.

c. Predictive Analytics

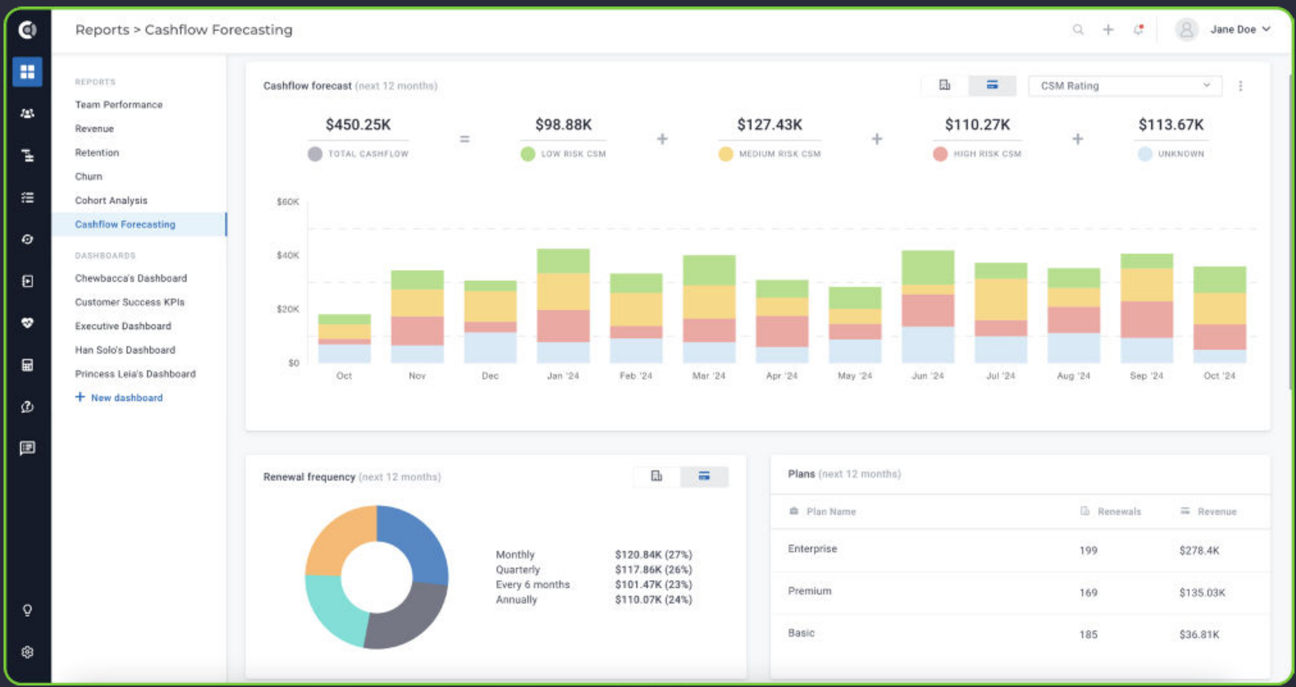
While having real-time alerts and analytics is a fantastic resource for CSMs to have at their disposal, there is still an issue with them.

Any data that is gathered and interpreted, even in real-time, is a **lagging indicator that represents events that have already happened.**

What about if you want your team to start being even more proactive and looking ahead into the future using leading indicators?

The good news is that you don't need to stock up on crystal balls in order to see what's coming for your customers, you can use **predictive analytics** instead.

This is because the most advanced customer success platforms have begun to leverage machine learning technology to offer predictive analytics.



Source: Custify app

Put simply, this technology looks at the past behavior of your customers - both individually and as a group - and then uses that information to predict future actions.

In the world of customer success, these predictions could include positives like the potential for upselling, as well as negative events like the risk of a customer churning.

Of course, these predictive analytics have no way of knowing what is going on behind the scenes with your customers - they are trained to use the data in front of them to make accurate predictions.

This means that they're not completely foolproof, but using these predictions can be invaluable for account planning and strategic decision-making.

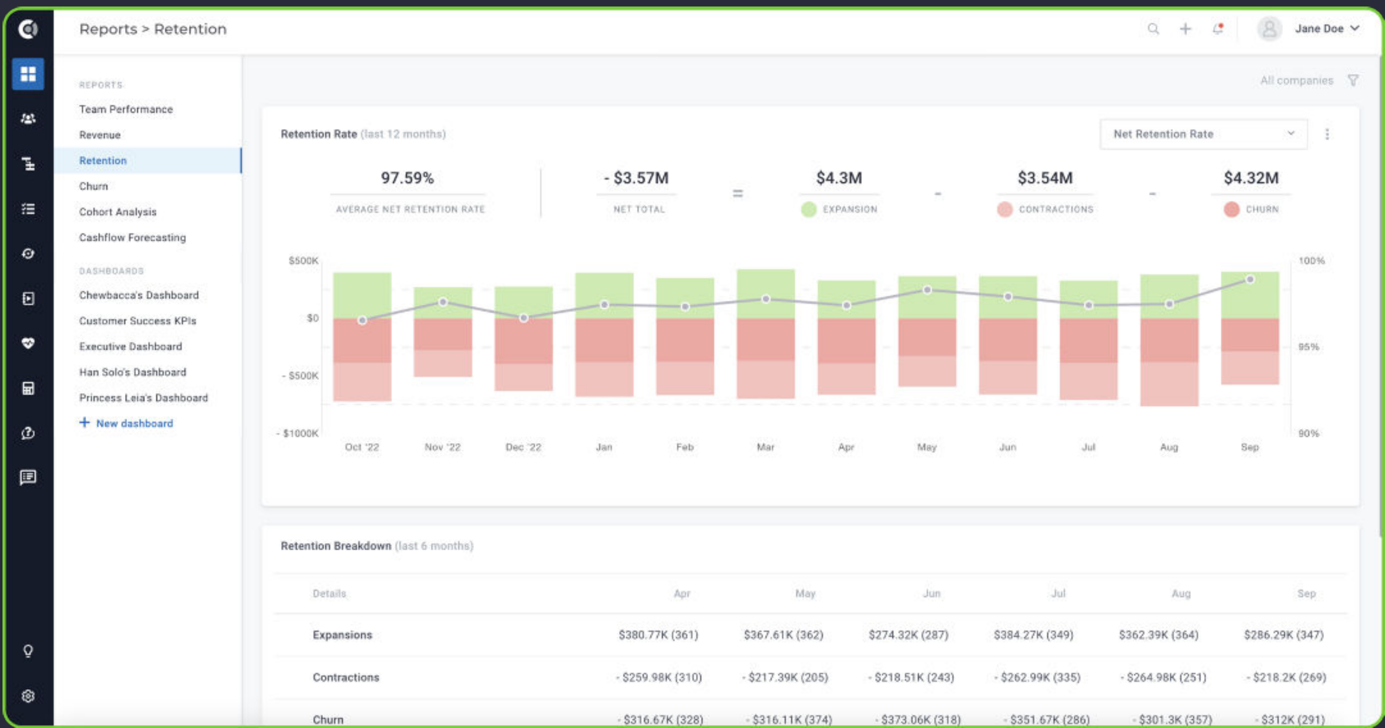
Estimated time saved: 4 hours per CSM per week.

d. Automated Reporting

When it comes to data and customer success, if there's one job people hate above all else - it's reporting.

Asking your CSMs to create reports manually can result in a time-consuming process that runs a high risk of producing errors.

To counteract this time-sapping, error-prone task, you can use your CSP to automate your reporting for you.



Source: Custify app

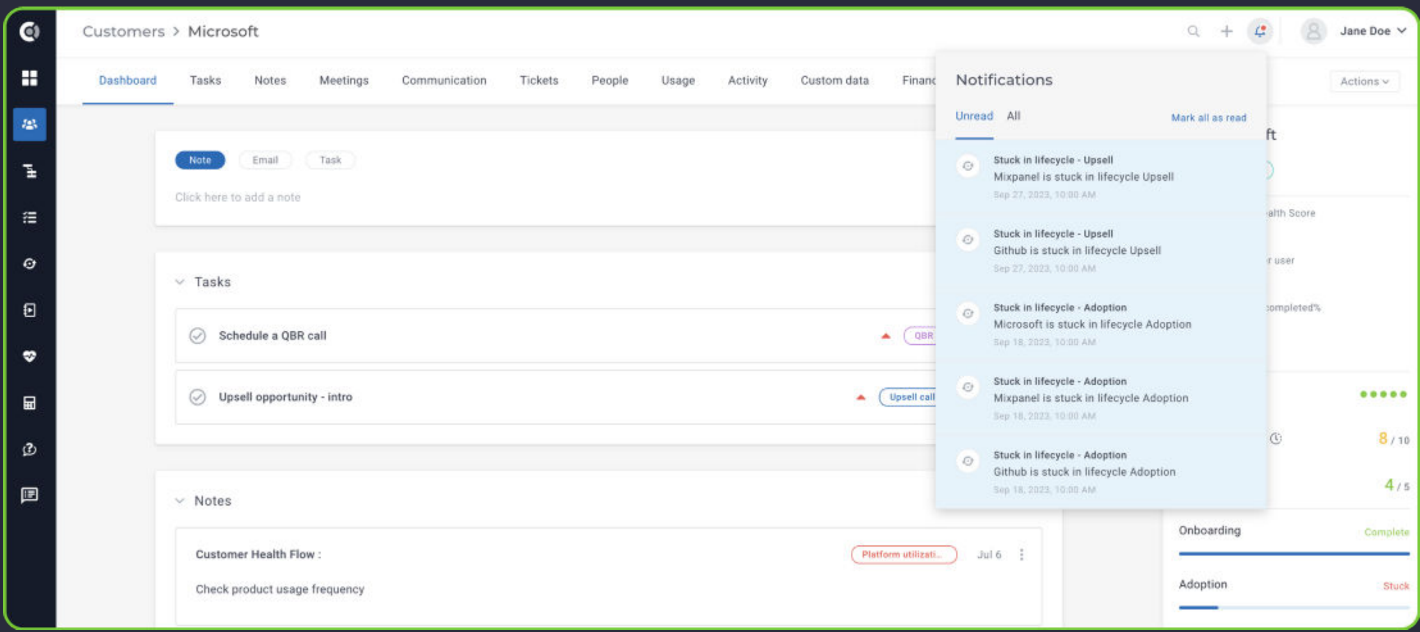
By using the technology behind a customer success platform to automatically generate custom reports for you at any time interval you can imagine, it will enable your CSMs to share up-to-the-minute - and highly accurate - reports with internal and external stakeholders, keeping everyone in the loop at the click of a button.

Estimated time saved: 8 hours per CSM per week.

5. Actionable Insights

A CSP has the power to not only centralize and present all your customer-related data, but also take it a step further by providing actionable insights.

This means that the data isn't just presented nicely in a chart or graph, the system will also analyze the data and automatically offer suggested actions for your CSMs to take.



Source: Custify app

Actionable insights don't just solve problems; they help prevent them. By continuously monitoring customer behavior and engagement, a CSP can alert your CSMs to red flags before they escalate into real issues. This could be a sudden drop in user activity, or a lapse in usage of key features—either way, these insights enable your team to proactively engage with the customer.

For example, if the data reveals that one of your customers is not making use of specific features in your software, the platform may recommend that the CSM sends an educational webinar or a targeted email campaign to enhance engagement with those features.

Estimated time saved: 2-3 hours per CSM per week.

CHAPTER VI

Leveraging Automation For a Smoother Customer Journey

If you're a keen student of the world of customer success, you'll have seen all sorts of changes come into play over the years.

However, in the same way that customer success is constantly evolving, at the same time, some things never change.

The one thing that'll never change in customer success? The need for CSMs to be hyper-efficient.

As your business scales, managing an ever-growing list of customer accounts becomes increasingly complex.

The manual processes that you used to use when you had a handful of customers will ultimately become useless as your customer base expands.

Supporting this growth is where automation comes into play. It serves as the 'secret sauce' behind creating a smooth and seamless customer journey every time.

With this in mind, in this chapter, we'll explore the role of automation in customer success and investigate the types of tasks that can be automated to save CSMs some serious time.

The Role of Automation in Customer Success

1. Scalability

Above all else, using automation allows you to quickly improve the scalability of your customer success services.

As your customer base grows, using automation within your CSP allows you to manage more accounts without proportionally increasing the workload of your CSMs.

This enables you to maintain high levels of service quality even as you scale, without service delivery costs increasing at the same rate.

2. Consistency

Above all else, using automation allows you to quickly improve the scalability of your customer success services.

As your customer base grows, using automation within your CSP allows you to manage more accounts without proportionally increasing the workload of your CSMs.

This enables you to maintain high levels of service quality even as you scale, without service delivery costs increasing at the same rate.

3. Time-Saving

As we've previously mentioned, time is the most precious resource when it comes to customer success.

Using automation to underpin the way your teams work means that you can single-handedly free up your CSMs from routine or repetitive tasks.

Not only does this make your CSMs happy, but it also allows them to focus on what they do best - strategic thinking, relationship building, and problem-solving.

4. Personalization at Scale

In our previous chapter on personalization, we outlined just how crucial a more personalized approach is to customer success.

Automation allows you to deliver these ultra-important personalized experiences at scale.

For example, different customer behavior can trigger different email sequences to be delivered to them, so it feels like the information they're seeing is entirely in context with what they're working on - rather than a generic email with limited value sent to all customers.

I use technology to remind users to complete their setup, push unused modals to users with videos, boost adoption, and encourage renewal (monthly to yearly subscription).

Elisabeth Courland

CS Ops at Agorapulse

Using automation to handle all this behind the scenes, frees up your CSMs to build better relationships with your most important customers.

Tasks That Can Be Automated

a. Onboarding Processes

The onboarding phase is a critical tool for you to use in setting the tone for the ongoing relationship with your customer.

Automating key workflows within the onboarding phase can help you:

- ✓ Guide new customers through the initial setup,
- ✓ Provide them with relevant resources,
- ✓ and even schedule introductory calls with CSMs.

As a result, the use of automation not only ensures a smooth and engaging onboarding experience - but can save your CSM significant time as well.

Estimated time saved: 4 hours per CSM per week.

b. Communication and Notifications

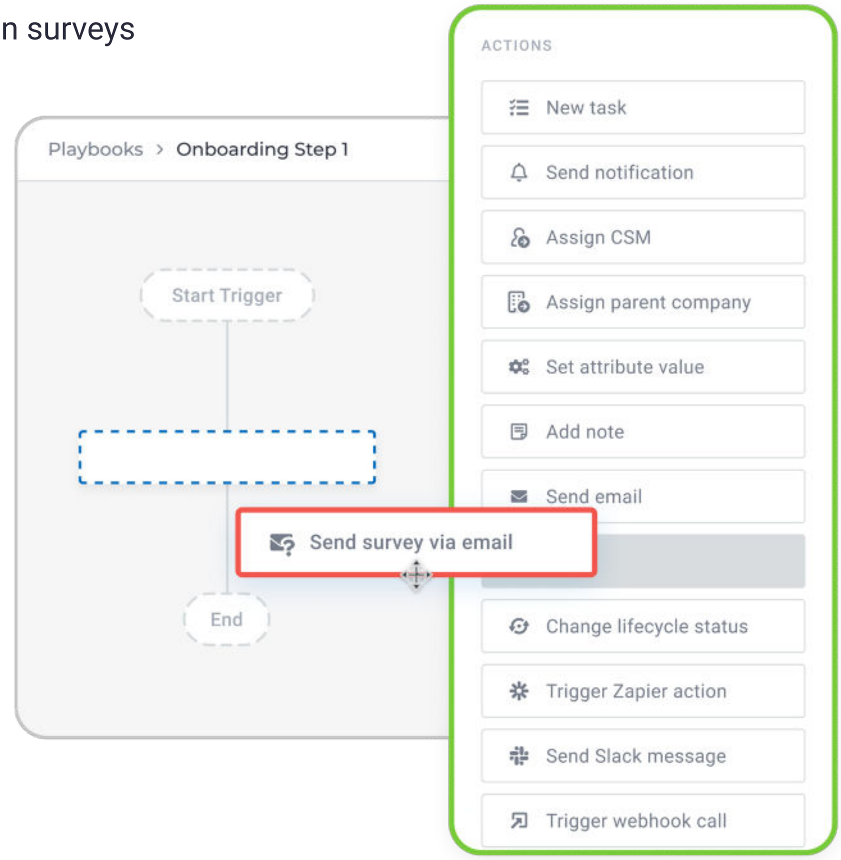
If you've got good telemetry around value drivers and can tie that into a customer success platform, you can give your customer nudges... in real-time... exactly where needed.

Rob Stevens

Senior Director, Customer Success @ iBASEt

Customer Success Platforms are continuing to evolve at pace, and part of that evolution sees them now able to automate a variety of communication tasks, including:

- ✓ Renewal reminders
- ✓ Product updates
- ✓ Satisfaction surveys



On top of this, CSPs can also offer real-time notifications, which will alert you and your CSMs about any number of customer activities, like:

- ✓ Customers reaching a milestone
- ✓ Customers encountering an issue
- ✓ Customers failing to use the product

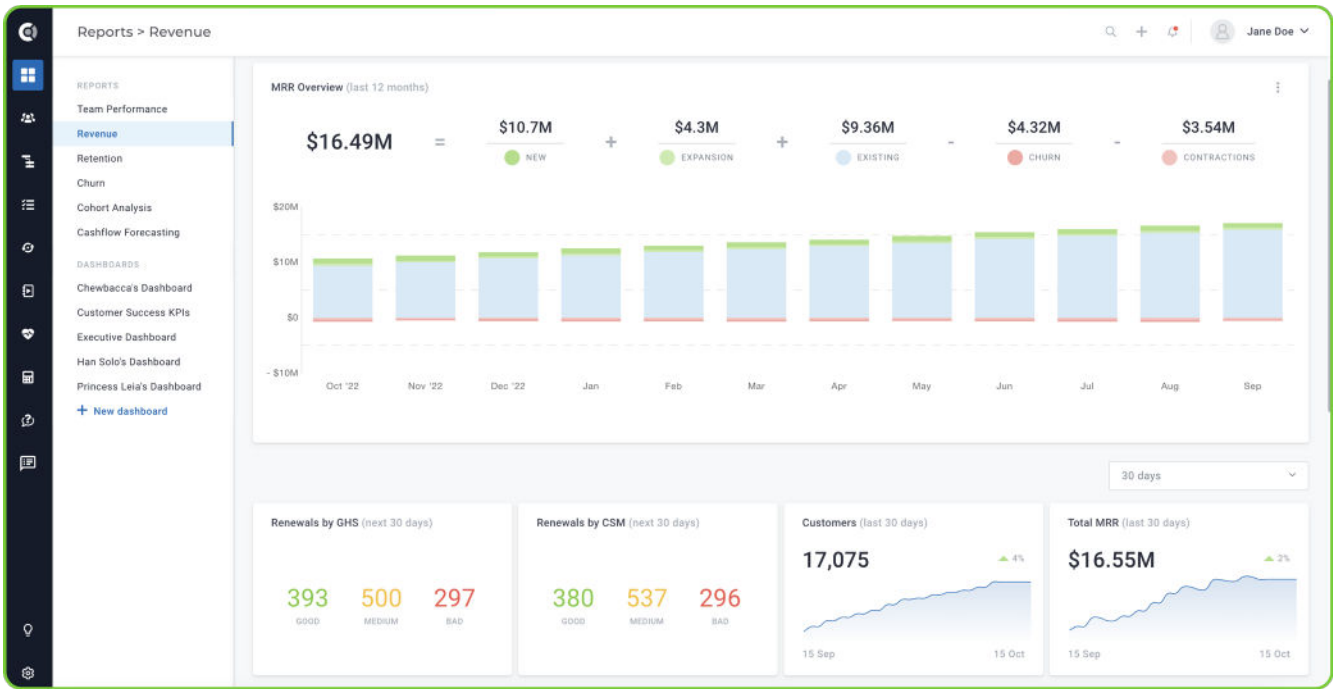
Estimated time saved: 1-2 hours per CSM per week.

c. Data Collection and Analysis

As we've mentioned already, data is vitally important for customer success.

Without it, you're constantly in reactive 'fire-fighting' mode, and no longer have the time or energy to do high-quality proactive engagement with your customers.

Using a customer success platform as the 'brain' or 'heartbeat' of your CS function allows you to integrate with all the other platforms in your business and automatically bring together all the various data points into one central space.



Source: Custify app

This data can then be automatically analyzed using inbuilt tools within your CSP to provide actionable insights - and even predictive analytics - to help you and your team make more informed decisions.

Estimated time saved: 3 hours per CSM per week.

d. Customer Segmentation

You can also use automation to help you segment your customer base.

By looking at your customer using criteria like industry, usage patterns, or revenue potential, you can start to formulate a robust customer journey plan that is specifically designed for that segment.

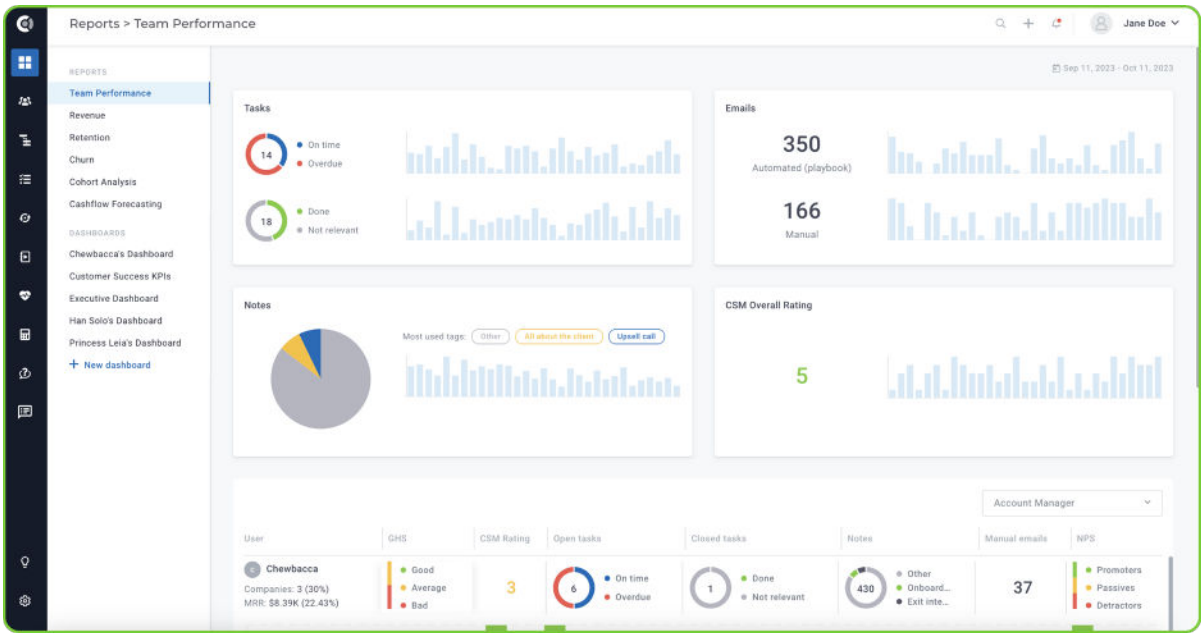
As a result, this automated segmentation enables you to develop a more targeted and effective customer communication strategy - and also allows you to tailor your services to different customer segments.

Estimated time saved: 2 hours per CSM per week.

e. Reporting

Producing high-quality, data-driven reports is a perennial challenge for CSMs everywhere.

They’re time-consuming, often difficult to do, and can quickly become strewn with errors.



Source: Custify app

Thankfully, automated reporting can ease the burden on CSMs by generating detailed reports on customer health, engagement levels, and other key metrics - all at the click of a button.

These reports can also be set up to be run at specific intervals, so that everyone is kept up-to-date on customer success performance, without your CSMs having to spend countless hours producing reports.

Estimated time saved: 7-10 hours per CSM per week.

Automation is the silent engine that powers effective Customer Success. From streamlining onboarding to real-time notifications and data-driven decision-making, automation amplifies our ability to be proactive rather than reactive. It's not just about saving time; it's about elevating the quality of each customer interaction and making every moment count. In a world where customer expectations are ever-evolving, automation keeps us agile, informed, and ahead of the curve.

Irina Vatafu

Head of CS at Custify

Philipp Wolf,
Founder & CEO - Custify

In conclusion

If you're currently persevering with manual processes and a variety of generalist software products to manage the success of your customers, we hope you can now see more clearly how a specialist customer success platform could help you.

It's clear that by leveraging dedicated technology and automation - alongside the latest in customer success strategy - you'll be much better placed to serve your customers and retain them for years to come.

Implementing a customer success platform into your organization can not only help you to save the precious time of your CSMs - but also create a best-in-class experience for your customers as well.

CSP technology may seem like a daunting or seismic change in your business, but we're here to say that it's not, and the net benefit of bringing in a customer success platform is undoubtedly going to outweigh any potential drawbacks or concerns you may have.

So, if you want to save your CSMs countless hours every week and make them more productive - and develop compelling experiences for your customers, then it's time you consider a customer success platform.

Schedule a quick call

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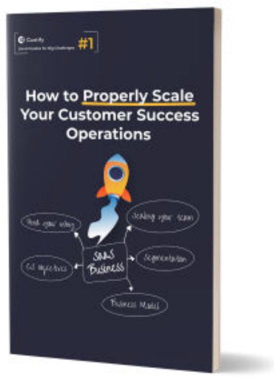
Customer Success Strategy



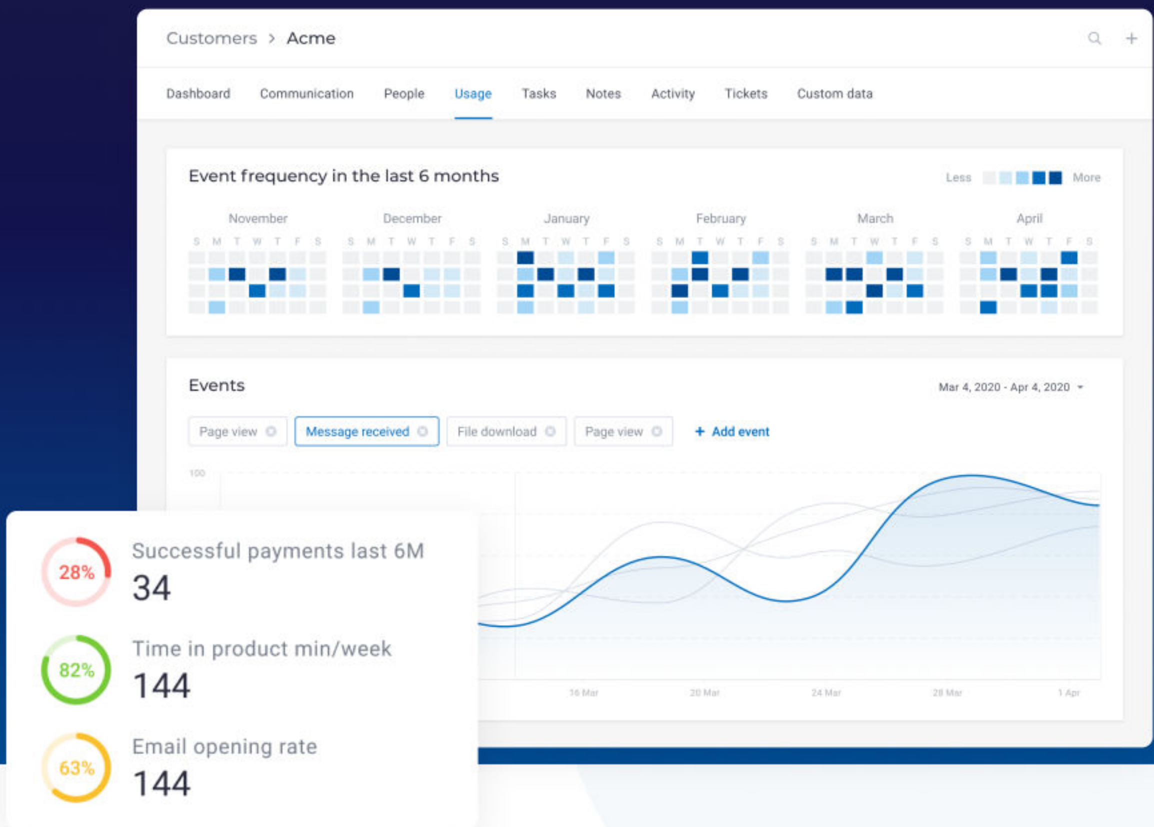
How to properly scale your customer success operations

Selling the Customer Success Story Internally

The Role of Data in Customer Success

At Custify, we focus on helping SaaS businesses achieve:

- ✓ A 360° view on customers
- ✓ A much lower a churn rate
- ✓ Renewal, growth and upsell opportunities
- ✓ Proactive customer issue resolution
- ✓ Automated outreach



Do you want to understand why your customers are leaving?
See if Custify is right for you.

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