Calendly

Calendly for Customer Success

Drive better interactions and increase retention

It's more important than ever to interact with customers at key milestones—whether they contact you or you reach out to them. Instead of a disjointed experience with scheduling delays, kick off a strong partnership and maintain engagement with customers through renewal time. Appeal to your customers' needs and support your CS team to drive adoption, improve customer health, and increase retention and account expansion.

The current state of customer success

Customer-facing teams strive to provide superior service, but customers' expectations are continuously increasing. It's a challenge to efficiently schedule handoffs, onboarding calls, training sessions, renewal conversations, and tech support interactions.

Your team works hard to support customers, and how quickly they respond drives satisfaction. In fact, slow response times can cause a 15% increase in churn. Calendly improves your team's efficiency by increasing response times, integrating with CS tools, and handling logistical and follow-up tasks, while empowering your team to focus on building strong partnerships.

How customer success teams use Calendly

- Allow customers to book a meeting with the right specialist directly from your website or support chat function

- Share scheduling links in your emails and messages to customers

- Schedule every meeting faster—from onboarding to check-ins and QBRs to renewal calls

- Reduce no-shows and automatically send thank-yous and feedback surveys

- Sync with your CRM to track meeting performance and engagement

---

50%
Reduction in time for sales handoffs to account management

ancestry

Case study

30%
Increase in annual customer retention

conductor

Case study

160%
Increase in customers reached

VONAGE

Case study

323%
ROI with Calendly - including savings in admin costs

CI ASSANTE WEALTH MANAGEMENT

Case study

What our customers say

ancestry

"If we took Calendly away today, there would be an uproar. It has transformed the way we interact with clients and deliver on projects. In our case, everyone wins."

Case study

Cengage

"Companies that go through the 1-1 training become a better customer for a longer period of time. Calendly is making it even easier for us to schedule with those customers, and more customers keep those appointments."

Case study

CI ASSANTE WEALTH MANAGEMENT

"Setting up a Workflow and being able to assign it to many different Event Types saves the advisors significant time and money. We even started using the thank-you email as a digital business card."

Case study

Benefits Calendly provides for customer success

Improve engagement at every stage
Grow lasting relationships and make your product/service sticker with 1:1 check-ins, training sessions led by experts on your team, group/cohort networking, and special one-off times for urgent needs.

Empower customers to self-serve
Allow customers to book the exact meeting they need from your team scheduling page—with options such as product questions, pricing discussions, user training, and tech support.

Make every interaction valuable
Standardize the customer experience to ensure each customer receives dedicated and personalized attention.

Respond to customers faster
Solve customer issues quicker by connecting customers with a support specialist who can help solve it.

Update customer data in real time
Automatically update customer records and remove admin tasks so your CSMs can focus on retention and growth initiatives.

Customer success teams using Calendly

ancestry

AgriWebb

VONAGE

conductor

Criteria

CI ASSANTE WEALTH MANAGEMENT

zendesk

Favorite customer success features

Salesforce and CRM integrations — automatically update your CRM when meetings are booked and maintain accurate customer data

Custom questions — ask personalized questions during scheduling to prepare CSMs and Support Reps ahead of time

Embed Calendly anywhere — add Calendly to your customer support page, team scheduling page, or email signature so customers can easily reach you

Managed Events — standardize best practices of meetings and push out updates to your entire team

Collective Events — bring your entire customer team together to welcome new customers and kick off onboarding

Calendly Workflows — automate reminders, confirmation requests, and follow-ups to reduce no-shows and keep customers engaged

Tailor your schedule for success — add buffers to automatically block time before a meeting to prep and pull account history

Additional guests — allow customers to add additional internal stakeholders to meetings

One-off meetings — connect in real-time by sending a quick, single-use link to answer important questions or finalize a renewal contract

Calendly Analytics — inform your CS processes and uncover best practices with insights that bring your meeting data to life

Ready to learn more about how customer experience teams use Calendly?

Contact your Account Executive or sales@calendly.com.