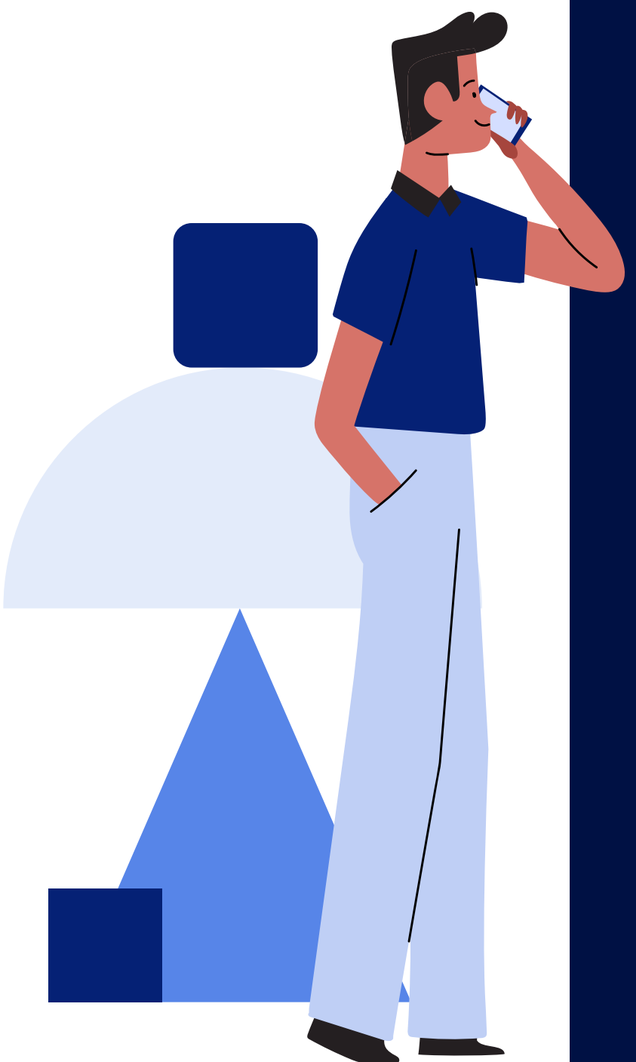
The Modern Customer Success Playbook

for Creating Data-Driven Customer Experiences



Proven strategies to help you achieve customer loyalty and growth—and reduce churn—at scale.



Introduction

The evolution of every high-functioning, effective customer success strategy centers around three C's: connected experiences, an engaging customer journey, and a culture built on customer-centricity. Satisfaction won't cut it. Quarterbacking your customers to long-term *success and growth* is proven to combat churn and transform customer success teams into revenue-drivers. But where do you start?

"If you begin with a growth mindset versus a fixed mindset, you can begin to ask, 'What does value look like? How can I try and meet customers in that place of value?'" says Dominic Constandi, vice president of customer success at ZoomInfo. "That's when you deliver a compelling solution—and as a result, an increase in upsells and renewals and less churn."

In fact, according to ChurnZero, reducing customer churn by just five percent can increase profits from 25 percent to 125 percent. But—we get it—when you're faced with a lack of visibility into customer adoption and health, high churn, and manual, reactive processes, how do you create scalable wins to begin to turn the ship?

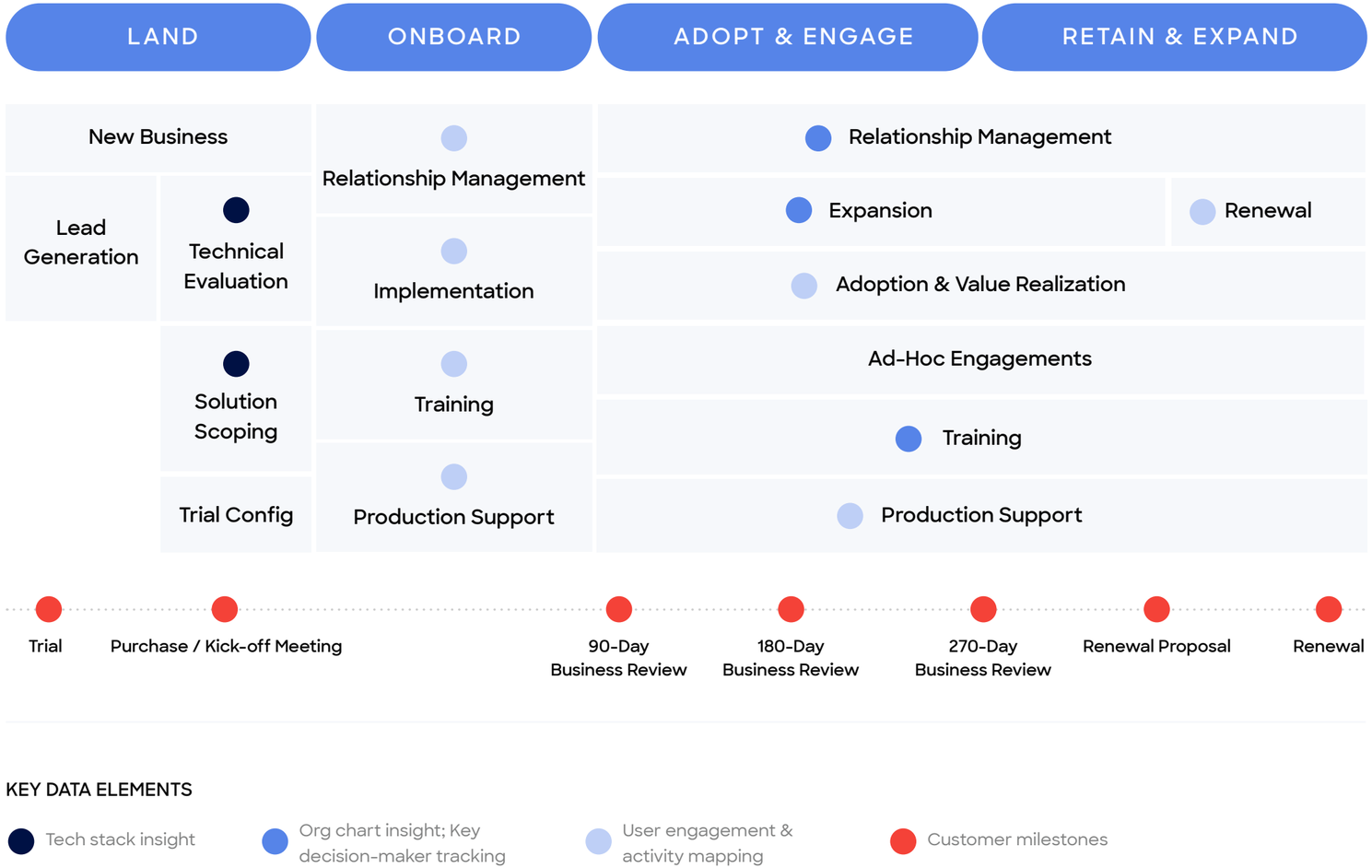
To meet today's customer expectations, customer success teams must evolve and use data-driven strategies—automated motions, real-time intel, buyer intent triggers—to create a connected customer experience, understand the complete customer relationship, and optimize the customer journey to drive loyalty and expansion.

We're here to help. This customer success playbook outlines best-in-class data-driven strategies to help your team successfully map and optimize the customer journey, including how to:

- Build a 360-degree view of your customer and drive more expansion opportunities
- Create highly targeted segments to drive more contextual and personalized engagements
- Develop an effective customer health scoring model to mitigate churn and identify opportunity across your customer base

Building Connection and Engagement Points to Move the Customer Forward in Their Journey

The Optimized Customer Journey



Benefits of creating a data-driven customer experience:

According to a Demand Gen Report survey, companies that leverage intent data see these top five positive impacts, including:

- Increased customer engagement and overall lifetime value
- Personalized messaging and proactive account management
- Automated motions that reduce human error and drive ROI
- Customized customer health scoring models that indicate churn risk
- Fueled growth through easily identifiable expansion opportunities

Phase 1: Land

Better Align Sales and Customer Success With Richer Ideal Customer Profiles

While many customer success teams skip past the land or discovery phase in the customer journey—often viewing this as sales-owned territory—this phase is where you can find your true north: the purest form of what your customer is looking for. While it's easy to fall into the trap of thinking how your customers fit into your product roadmap, Constandi advises customer success teams adopt two fundamental principles: empathy and customer-centricity.

"Every organization with a great culture around customer service asks themselves first and foremost, 'How is this customer experiencing what I'm doing?' For every customer, their experience working with a company is a very real one," says Constandi.

Before you onboard a new customer, conduct a "knowledge transfer" with sales to better understand your customer's history, needs, and expectations. Dig into what your customer's goals are, what "value" means to them, and what daily business challenges they're trying to solve. To start, you need to understand what your customer is working with, and land data such as technographics insight—essential technologies and tools a business uses to function—can power your team's initiatives to improve your customer's journey.

With "land" customer data, you can create key segments such as:

- Accounts by status (full customer versus trial)
- Accounts by funding round (series A, B, C)
- Accounts by tech stacks (CRM versus no CRM)
- Accounts by size (enterprise versus SMB)
- Accounts by production/edition (gold versus silver)
- Accounts by contract type and/or length (annual versus monthly; those with an opt-out)
- Accounts by industry and/or region
- Contacts by role (decision-maker, executive sponsor, primary contact)

Phase 1: Land

Technographic data provides you insight into purchase behavior, renewal dates, and historical purchases, allowing you to also identify at-risk accounts. Leverage a B2B data and market intelligence platform to view tech stacks, funding, growth rates, locations, and more to identify and define ideal customer profiles (ICP) and help you group accounts.

These data-driven insights will better position you to:

1. Specify agreed-upon traits by sales and customer success for what constitutes a “good customer;”

2. Identify the most strategic accounts with the highest revenue potential;

3. Build more complex parts of your customer lifecycle strategy as you think about upselling, cross-selling, renewal, and expansion.

Too manual of an effort or lacking these insights? Consider investing in a B2B data and market intelligence platform to help you group accounts.

Key Takeaways:

1. Identify your customers’ goals and desired outcomes early on.

2. Avoid bad-fit customers and preventable churn by ensuring sales and customer success align on your ICP.

3. Use your land data as the foundation for more complex phases of your customer lifecycle.

Accelerate Time to Value With Customer-Centric Onboarding

Customer onboarding has a significant and long-lasting impact with deep ties to a customer's likelihood to churn. If you want to increase your customer's chances for long-term adoption, they need to immediately see value from your product. Build a thought-out journey timeline that ensures your customer quickly achieves the tasks most relevant to *their definition of success*. Customer success teams that take the extra effort to tailor their onboarding to fit the customer—instead of their product roadmap—strengthen their product's use case and build a compelling incentive for adoption.

"Teams have a bad habit of defining customer journeys and processes around what they want to accomplish," says Abby Hammer, chief customer officer at ChurnZero. "But the best onboardings are purpose-designed to help customers quickly achieve milestones that matter to them."

While talking directly to your customer to learn their specific goals is the ideal scenario, this may not be a reality for high-velocity teams with a massive book of business. Be careful of falling into the trap of believing you have to treat every customer the same due to sheer customer volume. You can tailor your onboarding experience at scale with the help of journey automation and usage data.

"Although onboarding seems like it's just the beginning, it's really a renewal-altering juncture and should be treated as such," says Hammer. "You wouldn't have blanketed conversations with customers about their renewal, so why would onboarding be any different?"

Whether through automated or manual monitoring, customer success teams must remain hypervigilant during onboarding to ensure customers stay the course. Along with real-time journey tracking, you should create a well-defined, triggered outreach strategy to consistently connect with your customers throughout this pivotal phase—and at exactly the right moments.



Phase 2: Onboard

To accelerate your customers' time to value, set clear objectives that are measurable against your goals and timeline. You should also track onboarding progress against time-bound tasks and achievements such as:

1 to 10 days: Requirements gathering

- **Task:** Schedule the welcome call.
- **Achievement:** Document goals.

11 to 20 days: Configuration

- **Task:** Prepare integration documentation.
- **Achievement:** Customer signs off on documentation.

21 to 30 days: Training

- **Task:** Conduct one-on-one instructional sessions based on user role type.
- **Achievement:** Customer meets product proficiency threshold validated through their usage data.

31 to 45 days: Go-live

- **Task:** Congratulate the customer on their launch.
- **Achievement:** Customer meets "active" user threshold, validated through their usage data.

With onboarding data, you can create segments such as:

- New customers last X days, by size, product, contract type, industry, region, etc.
- Actively onboarding customers
- Percentage of customers behind or stuck in onboarding
- Percentage of customer training attendance
- Customers by product fit
- Customers by CSM sentiment

With established time parameters, you can easily identify when a customer falls behind or becomes stuck as well as spot onboarding trends across specific segments or your entire book of business. Create an automated play that's triggered by a customer's outstanding tasks to send in-app messages and emails to drive the customer to take needed action.

"Your onboarding leaves a monumental impression on the customer with far-reaching effects and consequences that live on long after this formative phase," says Hammer. "Setting clear customer expectations early on not only embeds

competence and confidence into your customer relationship, but it also becomes a telltale sign of a customer's renewal likelihood. To gain customer trust, you need to articulate exactly what is expected of your customer and your team to achieve value—and by when."

Further Personalize Onboarding Using Land Data

Use land data to tailor onboarding based on customer fit to better prioritize and position accounts for early wins and long-term success. With technographics, you can craft a more personalized adoption dialogue.

"The broader understanding of a customer's tech stack or technology portfolio that you can have, the better solution you're able to offer," says Constandi.

Understanding a customer's tech stack nets you valuable insight into what solutions a customer has recently adopted and how you potentially fit, in both the short-term and long-term. You can then apply that data to craft a more personalized, engaging adoption session dialogue:

"Knowing our solution integrates with your ___ product, we'd like to provide you with a customized training for how to maximize ___ software."

These need-to-know customer data points act as a foundation for your messaging and segmentation—and your overall customer journey. Remember: "When you walk around with a hammer, everything starts looking like a nail," says Constandi. "Skipping right to the 'adopt and engage' section with a new customer makes them the nail."

Key Takeaways:

1. Getting started on the right foot during onboarding sets the tone for the rest of the relationship.
2. Onboarding has many moving parts. Set timelines and track progress for each major milestone to establish clear process expectations from the start.
3. Use land data to personalize onboarding and trainings for your customers' technology stack.

Monitor and Drive Engagement With Product Usage Data

“Adoption is always the make-or-break moment,” says Constandi.

Without understanding how users are engaging with your product, it’s incredibly difficult to speak to their needs. What do they do when they log in? What issues are they experiencing on your platform? What *benefits* do they notice when they’re using it? Get answers by examining various forms of product usage data, such as usage frequency, feature usage, active users, and the time users are spending in your product.

“Your first step is to understand from a metrics perspective how many users are engaged with your platform,” says Constandi. “You can then drill down and say, ‘how much of my user base is engaged on the part of the platform that I know is going to drive the most value for them?’”

Usage data enables you to keep track of your customer’s moves on your platform—from how many times they log in to what they do once they *are* in. Then analyze if customers are using the stickiest functionality or the features connected to their top goals so you can begin to cultivate power users and product champions.

Segment to Deliver Prescriptive Guidance and Automate Engagement

It takes more than generic how-to engagement to drive user adoption. Effective adoption guidance needs to be timely, relevant, and personalized to the user’s context. If you operate using a high-velocity customer success model, leveraging campaign and workflow automation is the optimal way to monitor and meet customer demand. It allows you to put a personal, genuine touch on your engagements to build more authentic relationships at scale.

When you prioritize your customer outreach using segments built upon tactical and strategic attributes—instead of QBRs that are often dictated by an arbitrary timeframe—it yields more fruitful conversations and outcomes. Driving continuous customer value requires an ongoing, event-based mindset that puts customer performance before meeting quotas.

“Your customers’ product usage is not linear,” says Hammer. “It shifts as your customers’ goals, priorities, and business challenges evolve. Following a set business review cadence ignores the immediacy of your customers’ wants and needs. You need to react to customer events in real time and in a meaningful way if you want to earn your place as a must-have provider. Customer data and automation are the launching points that get you there.”

Use Proactive Course-Correction and Customer Recognition to Fuel Adoption

If you find that adoption or engagement isn't quite where you'd like it to be, your next move is to ask, "How do I take action with this data to drive engagement?" Constandi suggests exploring whether there is a potential gap in the training for your product or a knowledge gap on the customer's part. This will inform how you can create quick wins to build confidence and empower customers to maximize use of your solution.

Here's an example:

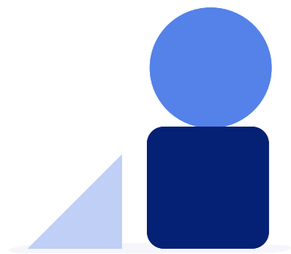
- **Scenario:** Your customer doesn't log in within the last 14 days. This is not a good sign.
- **Action:** Create a play to trigger an automated email prompting the customer to log in to check out a new feature or send use cases personalized to their top needs. Then, set a task to call them to check in a few days later.

Also, be sure to acknowledge and reward a customer's positive behavior.
For example:

- **Scenario:** A customer reaches 100 percent license utilization or secures a new funding round.
- **Action:** Send an email to congratulate them on growing their team and offer to schedule time to discuss how you can better support their evolving and expanding needs.

These small acts demonstrate empathy, encourage engagement, and go a long way toward building a personal relationship with your customer. It's easy for customer success teams to get hung up on pinpointing the perfect timing for engagements, but context and content of engagements are equally important.

"You could have methodically thought through the ideal number of days and weeks to reach out to a customer, but if your message is missing compelling, much less, needed context, it doesn't matter," says Hammer. "That's why in-app messages are so powerful when it comes to getting customers to adopt. It's the most logical and organic channel for instructional, action-driven product communications because it provides a frictionless frame of reference."



Phase 3: Adopt and Engage

With customer usage and adoption data, you can create segments such as:

Positive Behavior

- Customers without engagement for X days, by type of engagement (email versus call)
- Users active >15 days out of the last 30 days
- Customers with positive results from use of feature A (e.g., high open rates for sent emails)
- Customers who started using feature A and feature B within their first month
- Executive sponsors routinely using report A
- Primary contacts with daily usage

Negative Behavior

- Primary contacts without minimum product adoption by X tenure
- Customers with license utilization <20%
- Customers with fewer than 30 minutes in the app in the last seven days
- Customers who have never used sticky feature A
- Customers whose use of feature A has decreased >20% in the last month
- Customers who haven't used feature A or feature B within their first three months



Phase 3: Adopt and Engage

Another way to approach measuring engagement and improving ROI is to reverse-engineer your process.

“Identify what ‘good’ or ‘success’ looks like in your customer base across segments and customer profiles,” says Constandi. “Then you can decide on your ideal profiles for high-touch or high-velocity customers.”

Use details like executive changes, funding rounds, and a company’s funded initiatives for specific outreach at the right time. By distilling that theoretical customer down to business need, use case, usage pattern, and levels of engagement, you can start to build a profile of a successful customer that you can benchmark your team against. By figuring out which pieces of your product drive the most value for this customer profile, you can strive to find companies that fit that mold, and you can reach out to potential customers with the message that “the best companies that look just like you use our system this way.”

“That gives the customer something really tangible to strive toward,” says Constandi.

With this approach, you can then take steps toward building an automated, customized outreach system to bring users into the fold and make them feel like part of your process.

Key Takeaways:

1. Automate best-practice plays that drive action (based on engagement) and behavior.

2. Hyper-personalize outreach using real-time intelligence around executive changes, funding rounds, product launches, and more.

3. Drive high-velocity customer success models with engagement automation to make outreach more timely and relevant.

Proactively Monitor a Champion's Sphere of Influence

As a subscription business, you need to accurately forecast renewals and identify accounts with expansion potential. Keeping track of these fluctuating factors can quickly become an uphill battle as customer priorities and performance shift, which in turn, force you to continuously pause and pivot your time and attention. Allowing these customer changes—no matter how subtle or substantial—to go undetected results in ill-informed customer conversations and strategies as well as missed opportunities to save at-risk customers and expand accounts.

Few products are set it and forget it. Users change. Champions turn over. The value and urgency to understand everything about your customer and use it to your advantage to be proactive only grows.

"Manual renewal processes are the ball and chain of reactive customer success teams," says Hammer. "They shoulder this heavy burden of predicting and generating recurring revenue—the very lifeblood of SaaS companies—with a level of sophistication and precision that is not attainable given the scope and scale of tasks without automation. That's when renewal check-ins, usage slips, and outreach opportunities get missed."

Let's say your main contact (or champion) doesn't inform you they've left the company. You can find out earlier by creating an automated alert to notify you when their product activity stops. To be proactive, you need to always remain one step ahead and automation gives you that lead.

Avoid the danger of a single-threaded relationship by using organizational charts, which provide customer success managers with a roadmap to buyers and their sphere of influence—Who does your contact report to? Who else is on their team? What other teams work with them?—so you have multiple points of entry into the account, providing easy and direct access to decision-makers for upsell and cross-sell opportunities.

Supplement Your Customer Health Score With Firmographic and Technographic Data

Health score models help you identify churn before it happens by assigning a numeric score to customer actions such as a reduction in product usage, increased and/or decreased spending on your product, and the number of support conversations they're having with your team. Based on the numeric score you've given each of these actions, customers will fall into "healthy" or "unhealthy" categories, giving you a real-time look into churn possibilities.

In addition, any health scoring model should use, on the foundational level, great firmographics, technographics, and behavioral data. If you're relying solely on CRM data to build lead scoring models, you're looking at models built from a limited, narrow perspective. In order to stay ahead of competitors, you need an ongoing understanding of who your customers are today (and tomorrow). Let's face it: Your customers are *constantly* changing.

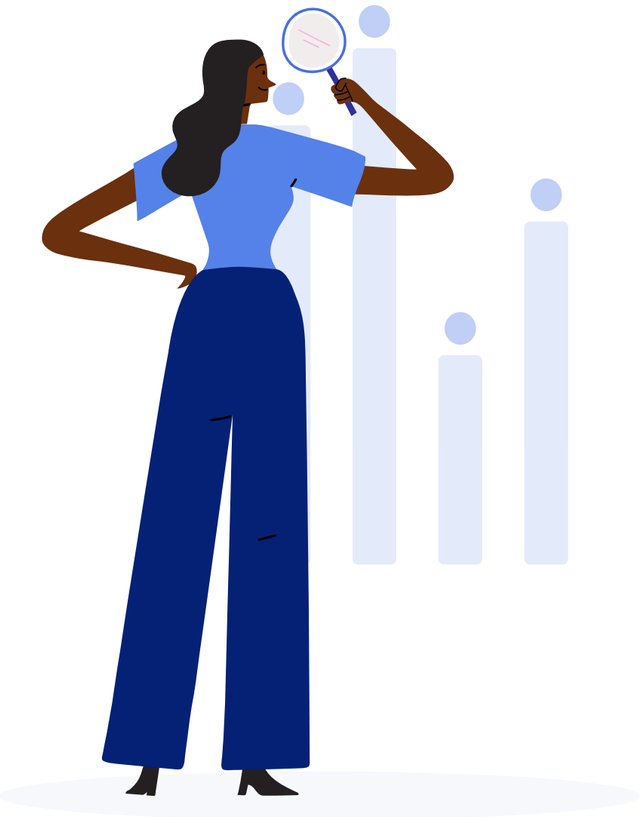
Phase 4: Retain and Expand

Quantitative health score factors:

- **Product usage**
  Login history, time in app, engagement with sticky or new features
- **Support history**
  Support ticket volume, SLA issues, open bugs duration, severity of cases
- **Service utilization**
  Use of purchased services, use of online resources and training
- **Customer loyalty**
  Length of time as a customer, Net Promoter Score® (NPS), product survey results, support survey results

Qualitative health score factors:

- **Relationship quality**
  Responsiveness, affinity, engagement with processes
- **Team feedback**
  Quality of support and/or service engagements, CSM sentiment
- **Satisfaction**
  Perceived ROI, level of customer advocacy
- **Risk rating**
  Customer maturity, customer fit, competitor risk, feature requests



Phase 4: Retain and Expand

“The early detection of alarming customer behavior affords customer success teams the best shot at salvaging the situation and saving high-risk accounts before they solidify and become irreversible,” says Hammer. “Your customers are not one-dimensional, so your health scores shouldn’t be either.”

An effective health score is dynamic with multiple weighted factors that are inclusive of both quantitative and qualitative attributes. They distill a bunch of complex indicators into a single functional value that can be used to power automated plays and journeys that put your customer on the path that’s most ideal for them at that time—all without the customer success manager having to intervene.

Very few customers will look the same as they did the year prior due to hirings, growth, funding changes, new technology implementation, and more. Having visibility into these changes as you’re working to build a segmentation or scoring model is critical so you know what their in-the-moment pain points are and how to speak to those pain points. Layering both CRM data with up-to-date firmographic information into your models lets you establish a more complete view of who your customers are and their potential for growth or churn risk.

It’s important to note that customer health scores are not one-size-fits all. You should develop distinct health scores across customer segments, lifecycle stages, and situational factors such as market conditions and global crises. A customer success platform allows you to easily automate, adjust, and monitor multiple scoring models at a time so that your potential risks remain relevant and in sight.

Another benefit of looking into the various technographics? With insight into the problems a customer is trying to alleviate via technologies, you can potentially offer solutions to that problem. The more value you can provide the customer and the more you can establish your product’s long-term value, the “stickier” you become.

Key Takeaways:

1. Identify customer actions, and assign each a numeric value to inform your health scoring model.
2. Combine objective and subjective measures for a full health score.
3. Determine your next steps using that health score. Is the customer likely to churn? What motions can you make to prevent that outcome?

Identify Expansion Opportunities With Buyer Intent Signals

Expansion conversations should never be out of the blue. If your customer doesn't know why you are talking to them about potential growth, you either haven't delivered them adequate value to justify having that conversation and/or you haven't picked the right moment for it.

So, when is the ideal time to talk to a customer about a new product? And how can you harness your data to find and capitalize on that ideal moment?

When you approach a customer at the ideal time to discuss expanding your partnership, it makes the decision a natural extension of your relationship. It puts you firmly in the "trusted advisor" seat, which yields much more success than the "I'm here to get more money" seat.

Expansion conversations don't always have to take the form of a hard pitch over the phone. You can increase your conversions with a softer, yet, more straightforward sell using in-app messages and product walkthroughs, especially when converting free trial users to paying customers or upselling product add-ons.

"By meeting the customer on their own terms, you give them back the control and flexibility that can sometimes feel commandeered when a vendor is directly selling to you," says Hammer. "Customers uncover value themselves instead of feeling pressured to realize it from someone else, which can make all the difference."

You should first look at your customer's collective buying signals that occur both inside and outside of your platform, which when viewed in isolation, aren't always a telling or obvious sign.

Be sure to consider:

- Customer product usage
- Knowledge base searches and resource downloads
- Website and third-party review site searches
- Support tickets
- NPS reviews (especially coming into renewal)
- License utilization increases

For a look at what customers are doing on the B2B web at large, you need to tap into buyer intent data on top of your internal behavioral data. If you could, for instance, track 500 customers and get an alert whenever they increase their consumption of a certain topic across the web—such as articles or blogs—your ability to craft relevant messaging and build motions would skyrocket.

For example, are your customers increasing consumption of blog posts and articles related to a solution that you sell? Maybe they're checking out reviews of your product or searching for fixes to problems that you know your product can solve. Knowing this, you'll be able to build a motion out of that consumption data and engage with them at just the right time.

Phase 4: Retain and Expand

Some other ways to assess customer intent? Leverage your call recording platform to figure out whether a customer is speaking to things like competitive ideas or budget concerns. You can also keep track of their attendance at webinars to tap into which concepts are resonating with them.

Based on retention data, you can create segments such as:

- Customers renewing in the next X days, by size, product/edition, etc.
- Customers with upsell potential (product A to product B, addition of feature C, increase limits)
- Customers with license utilization >80 percent
- Customers with a positive account NPS
- Decision-makers who are NPS promoters
- Customers who actively engage with support to use resources and self-service learning
- Customers who had more than two meetings with their CSM in the last month

Key Takeaways:

1. Expansion conversations should always derive from a customer's realized value and be substantiated by their success with your product or service.
2. Track customers when their consumption of a certain topic on blogs, articles, etc., spikes. A data provider that offers buying intent signals will help you pinpoint these spikes.
3. Leverage intent data to deliver rich, meaningful, personalized outreach at the right time in your customer's journey.

Conclusion

Leveraging data-driven insights to enhance the customer journey must extend beyond the point where a prospect becomes a customer to truly make your company customer-centric. To get there, your first step is democratizing customer insights across your organization. Consider asking:

- What customer data points most benefit other teams?
- How do they access them in real time?
- How do you create productive feedback loops?
- How do you use data to involve every team in being customer-centric?
- How can customer success teams' in-depth knowledge of the customer influence what marketing and sales track and do?

Without cross-collaboration and sharing data across your business, you're putting a ceiling on the quality of the customer experience, ultimately decreasing your overall customer lifetime value. It's time to ask: How effective is your customer success strategy?

CHURNZERO

ChurnZero is a real-time customer success platform that helps subscription businesses fight customer churn. Our software solutions allow businesses to understand how their customers use their product, assess their health and their likelihood to renew, and give businesses the means to personalize the customer experience through timely and relevant touchpoints. Lean more at churnzero.net.

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