Ideas for Alerts

GETTING STARTED WITH ALERTS

Alerts provide early indicators that could help you save an account, present opportunities to expand the Account, and in general allow you to be proactive in contributing to your Customer's Success.This guide will help you identify potential points you may want to get Alerted on and is designed to kick-start your thought process on what Alerts would be meaningful for you and your team.

Awareness

Maintain awareness surrounding your Accounts

Open Tickets Above X in the last 30 Days
This may mean that the customer needs to have further training or may be frustrated with their experience

Customer Fell Behind in Journey
This could be an indication that the customer does not quite understand what they need to do next or is struggling

License Utilization is less than X%
This may be a sign that the organization is not adopting at the proper rate or needs further training

Usage

Give yourself a heads up on positive and negative usage trends

Event Decrease by X% over Y Time Period
Consider that a customer has a sharp decline in usage of a core function or logins - this could indicate they're looking elsewhere or are no longer engaged

First Time Usage
Don't just focus on negatives - consider getting Alerts for the first time someone uses a complex feature so that you can reach out to offer help

POC Usage
We've all been there. A POC doesn't let you know they've left the organization. Find out earlier by setting up an Alert to let you know when they stop performing actions in your solution.

Relationship

Consider some alerts that help to manage the relationship

ChurnScore Variation
For simple awareness and to prompt further investigation, consider setting an Alert for when your Customer crosses into the Red

Net Promoter Score
The score your customers gives you can be very telling. Set up an alert to let you know when a customer becomes a Detractor, Passive, or Promoter

Frequency of Contact
Depending on where you are in the Customer Journey and how mature your customer is - it could be helpful to know if you haven't engaged with your customer at all in X Days

Specific Contact Online
It might be helpful to set an alert for when your main POC or Decision Maker logs in close to renewal so you can catch them for a discussion

Administration

Keep yourself organized and on time with these Alerts

Task Well Overdue
While you can use the Command Center to see overdue tasks - it might be worthwhile to let you know when a High Priority Task is X Days Past Due to avoid anything going too far without being addressed

Checks and Balances
Should a field on the Account be updated by a specific point in the Customer Journey or an Opportunity created but is still missing? Alert yourself to make sure all information that will be used in the future is up-to-date

Missed Step
Sometimes, we get so wrapped up in the day that we forget to log something. For example, if you're supposed to have a QBR every 90 Days but haven't logged one - consider setting up an alert to get the action of setting it up on your radar.

Opportunity

Reveal Key Opportunities for Retention and Expansion

Customer is Approaching License Limit
Set an alert when the customer is within 80-90% of License Utilization - allowing you to approach them ahead of time to recommend more licenses before hitting the limit.

Recommend Complimentary Features
When a customer adopts a feature in full that is nicely complimented by another feature - set up an alert to reach to that person at the point they pass the ideal threshold and educate them on the value of using the two in tandem

Low Churn Score + Renewal
If a renewal is coming up within the next 90 Days and their ChurnScore is below X - it is a great opportunity to reach out and secure an early renewal

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