Plays or Journeys?

Journeys are your overall process for the customer life cycle or journey that are documented in an interactive way. This is to help your team ensure tight process management with analytics that will help you identify roadblocks in the process that need refinement.

Plays are more situational instances per Account or Contact that allow you automate and become more proactive. This can be when positive things like expansion opportunities present themselves or when a customer needs to be nudged to use a sticky feature that will help them reach their goals. Plays also help supplement Journeys with customer-facing items such as Emails, In-App Announcements, Updates to Accounts, and more.

Common Scenarios

A customer reaches out to you. They haven't been using your sticky feature, however, they would like to learn more.

Consider creating a Play that you can launch manually to inform them of best practices and set a few reminders to call the customer to ensure they're not running into trouble.

Sales just closed a deal! Now you're looking to onboard this Enterprise Customer. To ensure a smooth transition, you create an Onboarding Journey. The first Milestone includes Tasks assigned to both you and the Sales person to ensure the customer has a great experience.

A customer has not logged in within the last 14 days which is not a good sign.

You may choose fire off an automated email prompting the to log in and check out a new feature set or send along ideas for them to help utilize your solution. Then, you set a Task to call them a few days later. You continue to send these along until they finally log in.

Sales just closed another deal! However, this time the customer has purchased a consulting package or add-on module.

We should not assume they are to take the same Onboarding Journey as above. Instead, Copy the Journey and Create Additional Milestones and Steps that are applicable to the specific needs of this type of Account.

Your customer was tracking well through the Milestones in your Onboarding Journey. During training, however, they begin to fall behind. Specifically, they have not integrated with a key component to help them meet their goals.

An automated communication in-app along with follow up email a few days later gets them to execute.

Sometimes during training there are many Roles that should be engaged during the process.

To ensure a solid process that everyone follows, use Journeys as a way to both assign Tasks to the appropriate Roles and to help you manage the project across teams.

Executive and Quarterly Business Review cadences can be hard to keep up with on top of everything we are tasked with as CS professionals.

By creating a Play that fires off every time you have gone over X days without a Review, you'll never again leave a Customer wondering why they haven't heard from you and you'll never miss an opportunity to present further value.

A customer's Journey doesn't stop after Training. Adoption is a critical component to ensuring the success of a customer - no matter what their goals are.

Ensuring you have an appropriate path to walk with your customer down towards Adopting your solution in a way that will lead them meeting their goals is critical. Journeys will hlelp you map that path out.

Given how busy folks are today, it can be difficult to even nail down a discussion surrounding goals for the upcoming year and renewal.

The quick setup of a play makes light work of this by queuing up automated in-app messages and emails to the appropriate contact(s) to help you secure this discussion.

Have you ever had to relaunch a customer? Perhaps, it had to do with an acquisition or a major change in processes. It could be that they never fully got off the ground and "restarting" is the best way to move forward.

Consider a Journey that helps you relaunch the customer. Taking into Account the important pieces of information you may have mixed with items you'll need to address as they get back up and running.

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