

How IntelAgree Increases Customer Motivation and Output During Implementation

- Provide proactive and prescriptive customer guidance
- Get customers to actively engage throughout implementation
- Deliver instant insights to leadership without a reliance on Implementation or Customer Success

The Overview

IntelAgree, a growing contract management SaaS company, runs a lean (and not mean, but incredibly friendly) churn-fighting machine, consisting of the Customer Success and the Professional Services/Implementation team. Unlike most emerging companies, IntelAgree had the foresight to seek a scalable implementation and customer success solution before maxing out their operational capacity.



Staying true to the proactive ethos of Customer Success, IntelAgree's Director of Professional Services, Kyle Myers, and Head of Customer Success, Matthew Miller, sought to lay the preliminary groundwork for future team growth. As Miller put it, "Waiting a few years until we approached overload would have made it a nightmare." But IntelAgree's preemptive action doesn't mean the team still didn't encounter early growing pains.

The Challenges

As a relatively new function, the Professional Services and Customer Success teams found themselves:

- **Losing customer momentum during implementation.** Like most subscription businesses, IntelAgree's customer motivation is highest during the first few weeks following a sale. Customers are eager to adopt their new product and begin reaping its benefits. That is until it comes time to turn configuration and testing plans into a reality. As customers juggle competing priorities with hands-on and task-driven implementation work, their enthusiastic drive often stalls—and in turn, timelines get delayed.
- **Delivering guidance based on customer anecdotes.** Without visibility into product usage, the team's guidance for customer project leads is based solely on the project

lead's feedback. Reliance on feedback from the customer to inform the IntelAgree team about a pilot team's progress often proved inaccurate or inadequate. An incomplete view of customer activity also puts the team on a perpetual defense of deciphering ambiguous customer cues and spotting the next "red flag" event.

- **Using multiple spreadsheets on a shared drive to track a customer post-sale.** With CRMs, product usage ends as soon as the sale is done. IntelAgree needed a centralized tool that was designed to manage the client through their entire journey as a paying customer.
- **Expending substantial time and effort creating progress reports.** Manually aggregating and formatting data for internal and external customer journey reporting is a time-intensive labor, especially when fulfilling ad-hoc leadership requests with a quick turnaround.

What IntelAgree Did

IntelAgree partnered with ChurnZero to streamline the teams' operations and gave them the power to:

- **Automate customer-facing status reports.** "Rather than us create some overly detailed project plan and hold weekly status meetings, we can now generate External Journey Reports to share with our customers," says Myers. "It shows them exactly what they've done so far, what's expected of them next, and where we are against plan."
- **Validate customer pilots and testing.** IntelAgree couples External Journey Reports with product usage data to send more targeted guidance. Myers explains, "Event tracking specifies and expedites our feedback to customers. We can now advise a client as to whether they're truly ready to go live based on their completed events and if they exhibit the mastery and comfort needed to take the next step."
- **Automate customer engagement and internal tasks.** ChurnZero templated Plays help IntelAgree maintain a consistent voice and message across customer accounts and touchpoints. As the Customer Success and training lead, Miller's days are non-stop: "In the middle of a task, I'll abruptly think 'Oh no! I need to reach out to a customer and check in on something.' I don't have time to spend five minutes crafting an e-mail, so I use Plays. They're in my queue, waiting for me to review and send. They're a lifesaver. They guarantee nothing falls off my radar."
- **Standardize Customer Success workflows.** IntelAgree knew finding a Customer Success platform was a project they shouldn't delay, especially given SaaS companies' reliance on recurring revenue. Based on his prior Customer Success experience, Miller anticipated the challenges they'd face: "As we grew, I knew message consistency and process management would become unsustainable. I wanted to ensure our activity and workflows were formulaic and repeatable as we built our customer journey. Knowing that customer health is our driving force, we didn't wait to purchase until we needed to scale."

The Impact

Within four months of launching ChurnZero, IntelAgree was able to:

- **Increase customer product usage during onboarding.** Empowered with usage data, customer champions can address challenges and help team laggards. “As a result of human nature, most people don't like to admit when they're struggling. Or, they might have the mentality that if everyone else on the team say it's fine, it must be fine,” says Myers. “Now, we can quickly and accurately determine a customer’s proficiency and whether they've even attempted to complete a specific task. Then, we can redirect their activities internally.”
- **Create a new self-service implementation offering.** Using External Journey Reports, the team is building a new implementation tier called Launch Pad. Myers explains, “We're placing some of the implementation capabilities in our clients’ hands. It’s a more feasible approach for customers with smaller budgets. We can couple our IP with the External Journey Reports to track their tasks and the work that we’d traditionally do.”
- **Deliver instant insights for leadership without a reliance on Customer Success.** “ChurnZero’s reporting makes my job easier. Rather than creating status reports each week for leadership, I can share a dashboard with ChurnScores and product usage. Then, we have a conversation about the users who might need more attention instead of running down the entire customer list from A to Z,” says Myers. If IntelAgree’s leadership needs to quickly understand a client, they can access the dashboard without having to ask Implementation or Customer Success. Myers explains, “When we’re actively onboarding or helping clients, giving our executives that view when they need it, allows them to make better, more rapid business decisions.”
- **Keep customer momentum alive post sale.** To ensure customers stay engaged, IntelAgree drips training material to customers at optimal points along their journey using Plays. “We automate a Play to send a terminology sheet before a customer’s first configuration call. This ensures when we have the meeting, we’re all speaking the same language. Then, before a key testing checkpoint, we send training videos to familiarize the customer with the product,” says Myers.
- **Provide a consistent customer and employee onboarding experience.** Journeys and Plays standardize the teams’ daily work and define clear roles and responsibilities. “They ensure our team repeats actions that were successful in the past. If a customer churns, we can easily pinpoint why and identify the steps to prevent it in the future,” says Miller. For internal employee onboarding, Miller also saw automation benefits: “Journeys promote process uniformity, especially as we're onboarding new team members. Knowing the expectations of an individual journey drives consistent communication, particularly for our youngest and newest team members.”
- **Begin building a business case for investors.** “Leadership is excited about how this helps us in the future when we look to fundraise again,” says Myers. “That's not on the immediate horizon. But as a growing company, it's something that we’re always thinking about. Showing the company’s maturity as well as customer data—including their usage, value, and happiness—will be extremely useful to grow our business case and story of why other venture capital firms should invest in us.”

How You Can Start

At the beginning of their search, IntelAgree looked at 20 different products.

“Initially, we wanted a tool to track customer data. We viewed customer health scoring as a nice-to-have,” recalls Myers. “It wasn't until we dove in and started using the platform that the real power and importance of the tool came to light.”

So, how did the team make their final decision?

Miller reveals, “Journeys and event tracking are ultimately what lead us to select ChurnZero over other products.” Now integral to the teams’ daily operations, he describes their newfound attachment: “Let’s just say, we’d never want to part with those features.”

If you want to take control of the customer journey, increase product adoption, and provide more supportive, personalized customer guidance, schedule your demo of ChurnZero today.



"For anyone looking to scale their business, ChurnZero is a phenomenal tool. I'm very much about data and ease of use, and ChurnZero does just that."

Matthew Miller

Head of Customer Success at IntelAgree