

ChurnScores Enable MineralTree to Proactively Engage Clients and Offer High Touch Service

MANAGE HEALTH ACROSS
ENTERPRISE ACCOUNTS

HIGHER TOUCH EXPERIENCE
THROUGH AUTOMATION

PROVIDE A WORKSPACE FOR
THE ENTIRE CS TEAM

The Overview

MineralTree is a payment platform that helps thousands of businesses automate their invoice-to-pay process.

By cutting-out manual tasks like data entry, payment tracking and waiting for authorizations, the MineralTree platform streamlines the Accounts Payable (AP) needs of financial professionals around the world.

MineralTree's mission is to transform Accounts Payable and disrupt what has traditionally been a time-intensive process.



The Challenges

MineralTree's growing Customer Success team faced the following challenges:

- MineralTree was without a platform to identify accounts that needed extra attention. The team lacked visibility into customer health and the ability to directly influence health scores.
- While marketing automation and CRM tools had once sufficed, these tools no longer met the needs of the company's Customer Success department.
- A lack of a centralized workspace increased the chances that client tasks could slip through the cracks. Considering the company's rapid growth, an effective 'home base' for CSMs was a must.
- Customer Success Managers did not always have a clear view into new client progress - especially during onboarding and implementation phases. The team was limited in their ability to intercept clients who may have fallen behind.
- For the most part client outreach was reactive, rather than proactive. As such the team found much of their time filled with manual and repetitive tasks.

What MineralTree Did

MineralTree and ChurnZero came together to accomplish the following:

- **Introduced ChurnScores**– The creation and use of ChurnScores allowed the team to access in-depth customer health insights. Best of all this information is available at a glance – via ChurnZero, Salesforce or even Slack.
- **Segmented Customers** - Segmentation allowed MineralTree to effortlessly organize their customers. This dividing of accounts enabled effective account management based on their customer’s journey and engagement.
- **Automated Previously Manual Tasks** – Manual activities were reduced through the automation of common day-to-day tasks and communications. This freed up the team to provide high-touch service to MineralTree’s most valuable accounts.
- **Provided a Workspace for their CS Team** – ChurnZero provides a centralized home for the entire Customer Success team. A real-time dashboard with alerts and customer usage reporting helps ensure that the team never misses a beat.

The Impact

After only a short time, MineralTree has achieved the following results.

- Automated communications, known as ‘Plays’, have allowed the team to **provide high-touch service across all of their accounts**. All without needing to significantly grow their team headcount.
- Members of the Customer Success team have found a workplace in ChurnZero. CSMs can **effortlessly track new client progress across their entire customer lifecycle** – all in real-time.
- Segments have allowed the team to offer a higher level of service to their clients. Better organization of accounts **allow the team to marshal their efforts towards the right customer sets or user personas**.
- ChurnZero has provided the visibility and platform to **better manage accounts that were showing signals of slipping health**. The resulting gains have accelerated growth across the entire organization.

How You Can Start

Despite providing an exceptional Customer Experience, the MineralTree team realized that efficiency gains could be made across their entire customer journey. For this fast growing organization, increasing customer visibility and leveraging automation were essential to their long term success.



Whether you are a fast growing startup or a well established business, consider the impact a real-time Customer Success platform can have on your organization. Tools like ChurnScores and automated messaging have the power to make your CSMs more productive and better equipped to make informed decisions.

Ready to take your CS team to the next level? Our team of best-in-class Customer Success Managers are ready to partner with you. Join the ChurnZero family today by visiting us at churnzero.net.



“ChurnZero has given us the ability to look at our clients’ experience through data & trends...not just ‘gut feelings.’ This has put my team ahead of the curve.”

Joseph Fortini
Vice President of Customer Success
MineralTree