

# Standardized Journeys and NPS Help with Customer Onboarding and Health Monitoring

**MANAGE 15K+ SMBS ACROSS 8 CSMS**

**INCREASED AUTOMATION FOR NEW CUSTOMER ONBOARDING**

**100% INCREASE IN ACCOUNT-TO-CSM WORKLOAD**

## The Overview

Untappd is a growing technology platform that allows consumers to ‘check in’ and share which beers they are currently enjoying. Besides creating a tight-knit community of beer enthusiasts, Untappd’s mobile application allows for tens of thousands of businesses to promote and publish their beverage menus.



By bringing together enthusiasts and businesses, Untappd is advancing the global beverage industry while helping users discover their next great beer.

## The Challenges

Untappd’s Customer Success team had the following challenges:

- Untappd’s Customer Success team lacked a centralized ‘home’ to work out of. It was a struggle to keep up with customer data, account history and overall satisfaction.
- The team lacked guidance and automation around renewal management. There was no assurance that the right customers were being hit with the right messaging based upon their renewal needs.
- Untappd had an idea of what should comprise their customer health scores but had no way to track it. Questions also surrounded how to properly weight the contributing factors of these scores.
- The fast-growing CS team struggled to keep up with their increasing user base. A lack of task management and easily accessible customer health scores prevented the team from fully harnessing their data.

## What Untappd Did

Untappd and ChurnZero partnered to accomplish the following:

- **Increase Team Productivity Through Automation** – Automation enabled the CS team to proactively engage with their accounts. Automated tasks and communications ensured that customers were being targeted with the proper messaging. This freed up the team to provide high-touch service to the appropriate customers.
- **Harness Data-Driven Insights** – The platform allowed Untappd to access in-depth insights about their customers and their product usage. By providing easily accessible data and making use of NPS, the team can tailor their engagement and make every conversation count.
- **Map Their Customer's Journey** – By mapping their customers' journey from onboarding through renewal, the team is now able to track account progress in real-time. Untappd has benefited from the ability to take a proactive approach to account management.
- **Standardized Customer Health Scoring** – ChurnZero and Untappd worked to identify metrics that accurately scored their customer health. Centralizing customer data and properly weighting the components of Untappd's health scores allowed the team to stay up-to-date on churn risks.

## The Impact

In less than a year, Untappd has realized the following results:

- Since implementation the team **has increased their number of accounts managed to over 15K SMBs**. Despite this rapid growth, the CS team is still able to deliver an exceptional customer experience with only 8 employees.
- More robust Customer Segmenting and Health Scoring has allowed for the team to prioritize their communications. Powerful segmentation allowed for **retention rates to increase, usage trends to be identified and service gaps closed**.
- The use of Automation and Task Management has enabled **Customer Success Managers to be more efficient and effective during customer renewal cycles**. Despite differing contract terms and renewal periods, the team can accurately manage the complete renewal lifecycle.
- The Untappd team has **found a home in ChurnZero's centralized dashboard**. This centralized workspace has not only allowed the team to keep a pulse on their customers but has provided robust ROI through a reduction in churn.

## How You Can Start

After a lengthy evaluation process the Untappd team found a partner in ChurnZero. Unlike other options, the ChurnZero platform offered unparalleled customer visibility. By providing analytics that helped anticipate changes in a customer's success, Untappd's CSMs found a home in the ChurnZero platform.

The tool's ease of use enabled the Customer Success team to effortlessly scale along with Untappd. With the CS team planning to double by the end of 2019, ChurnZero has enabled the growing team to continue delivering exceptional customer experiences.

Whether your team is well-established or looking to grow, consider the power that real-time customer insights and automated messaging provides. If you're looking to take your Customer Experience to the next level, learn more by visiting <https://churnzero.net>.



*"The value we drive from having a live look at customer health for any individual account at any moment in time has been helpful across our entire organization"*

**Jeremy Jeffers**  
Vice President of Customer Success  
Untappd