



Drive customer-centric growth using data

Agenda



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- 01** Defining Customer-Centric Growth
- 02** Challenges and Solutions
- 03** The Future
- 04** Q/A

Data drives business: Customer-led growth

- Leverage customer insights to optimize customer experience
- Design targeted engagements to increase adoption and growth
- Easily scale while maintaining personalization at each customer journey stage



Poll: Data or Data?

Dat-ah

Day-ta

The Challenges

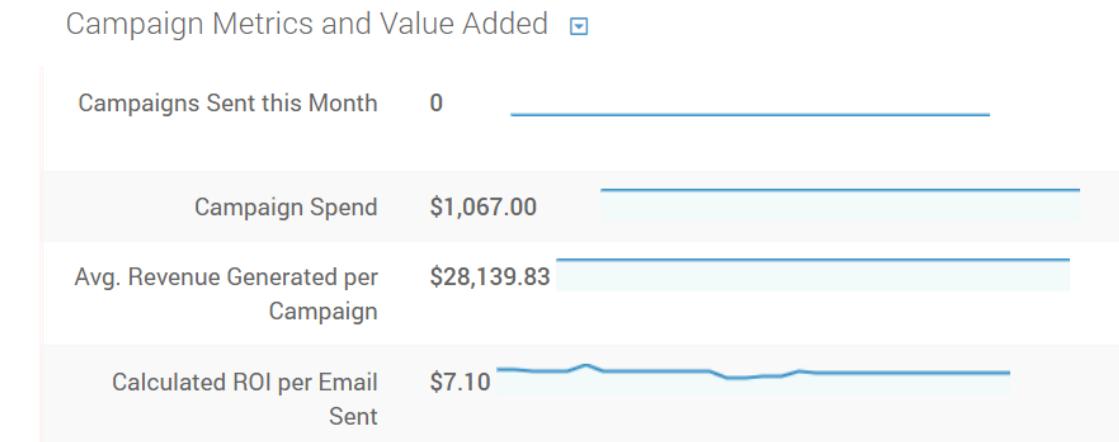
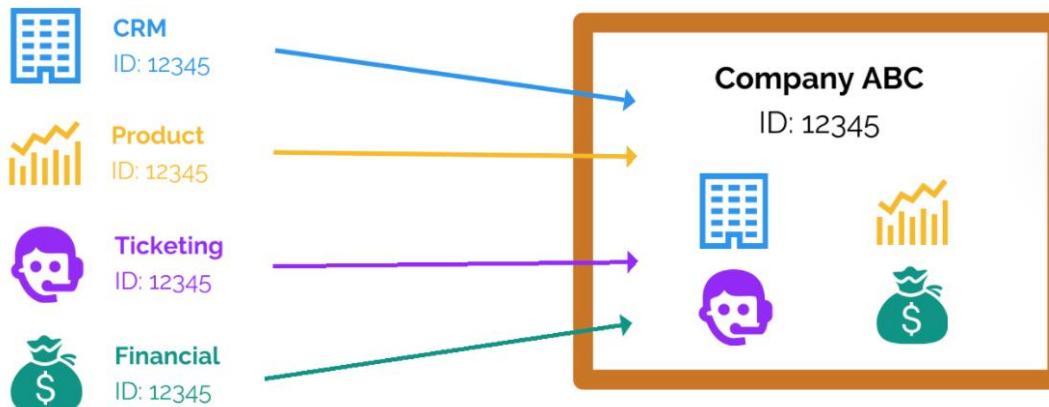
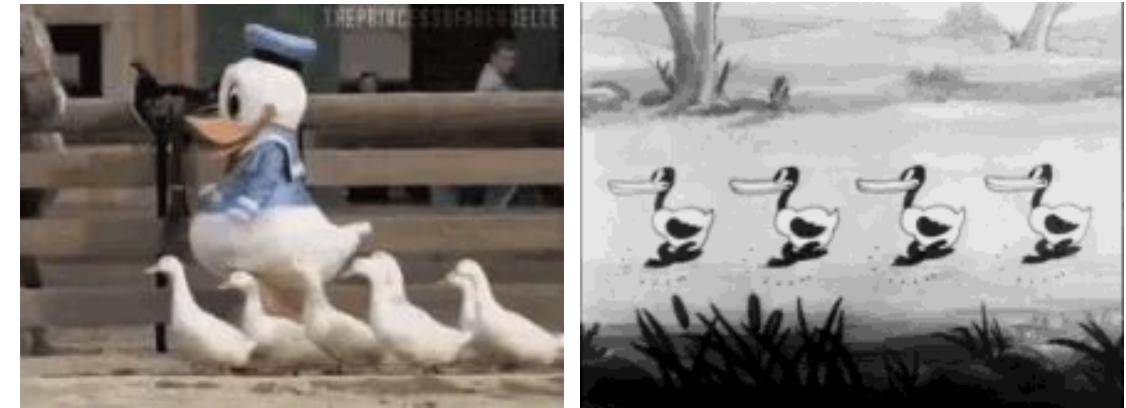
1. Access to customer data
2. Capacity for data collection
3. Finding a central repository
4. Cross-department visibility into efforts
5. Measuring and sharing outcomes



Access to Customer Data

Challenge: Difficulty accessing and activating customer data

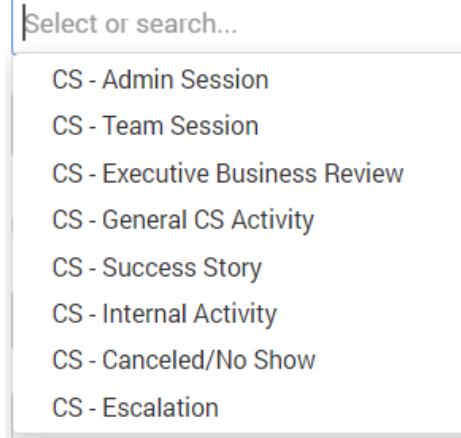
- Develop the analytic architecture to identify the critical data
- Turn the data into actionable insights
- What do we mean by actionable insights?



Capacity for data collection

Challenge: The gap between what leadership wants and what CSMs and customers have time for

- CSMs have limited time and capacity
- NPS and CSAT are not the best at capturing qualitative data we can turn into actionable insights



Finding a central repository

Challenge: Lack of central repository of available digital assets and rules of engagement

- Content Library for all the various content and the rules on deployment

Active Plays

Create New Play

Search Plays
Show: All
Implementation
Solutions Engineer
Implementation by Edition
Configuration/Training
Adoption
Adoption: End User
Upsell
Renewal
Account Transitions

Cross-department visibility into efforts

Challenge: Lack of cross-department visibility into efforts.

- Establish a feedback loop from customers to Product and Marketing
- Leverage tools to share customer insights across the organization.
- Create a *Voice of the Customer* channel everyone has access too.



Discussion Topics of Interest

Multi Select • Required

Answer

ChurnZero Best Practices

Customer Spotlights and Case Studies

Customer Success Industry topics

FAQs

Industry Specific Best Practices

Product Updates

Success Stories

Support Best Practices

Other - please add more detail in the following question.



Measuring and sharing outcomes



Challenge: Difficulty measuring outcomes and sharing across the org

- Accurate, real-time measurement of performance across channels
- Customizable Health Scores
- Automated dashboards and Cohort Reports
- Success Insights (powered by Machine Learning)

Quantitative health score factors:

- ✓ **Product usage**
Login history, time in app, engagement with sticky or new features
- ✓ **Support history**
Support ticket volume, SLA issues, open bugs duration, severity of cases
- ✓ **Service utilization**
Use of purchased services, use of online resources and training
- ✓ **Customer loyalty**
Length of time as a customer, Net Promoter Score® (NPS), product survey results, support survey results

Qualitative health score factors:

- ✓ **Relationship quality**
Responsiveness, affinity, engagement with processes
- ✓ **Team feedback**
Quality of support and/or service engagements, CSM sentiment
- ✓ **Satisfaction**
Perceived ROI, level of customer advocacy
- ✓ **Risk rating**
Customer maturity, customer fit, competitor risk, feature requests



Poll: Currently, what do you feel is your largest challenges are?

Access

Capacity

Content

Limited
Visibility

Measuring
Success

Using Usage data to drive adoption

With customer usage and adoption data, you can create segments such as:

Positive Behavior:

- ✓ Customers without engagement for X days, by type of engagement (email versus call)
- ✓ Users active >15 days out of the last 30 days
- ✓ Customers with positive results from use of feature A (e.g., high open rates for sent emails)
- ✓ Customers who started using feature A and feature B within their first month
- ✓ Executive sponsors routinely using report A
- ✓ Primary contacts with daily usage

Negative Behavior:

- ❖ Primary contacts without minimum product adoption by X tenure
- ❖ Customers with license utilization <20%
- ❖ Customers with fewer than 30 minutes in the app in the last seven days
- ❖ Customers who have never used sticky feature A
- ❖ Customers whose use of feature A has decreased >20% in the last month
- ❖ Customers who haven't used feature A or feature B within their first three months

Key Takeaways:

1. Automate best-practice communications that drive action.
2. Hyper-personalize outreach using real-time intelligence based around engagement and behavior.
3. Drive high-velocity customer success models with engagement automation to make outreach more timely and relevant

Using data to drive retention and upsell opportunities

Based on retention data, you can create segments such as:

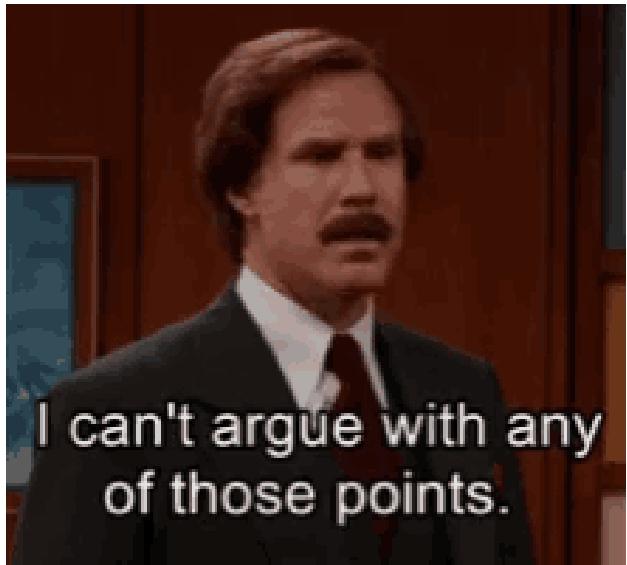
- ✓ Customers renewing in the next X days, by size, product/edition, etc.
- ✓ Customers with upsell potential (product A to product B, addition of feature C, increase limits)
- ✓ Customers with license utilization >80 percent
- ✓ Customers with a positive account NPS Decision-makers who are NPS promoters
- ✓ Customers who actively engage with support to use resources and self-service learning
- ✓ Customers who had more than two meetings with their CSM in the last month



Conclusion

Consider asking:

- What customer data points most benefit other teams?
- How do they access them in real time?
- How do you create productive feedback loops?
- How do you use data to involve every team in being customer-centric?
- How can customer success teams' in-depth knowledge of the customer influence what marketing and sales track and do?



Questions?



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