



**Automation for
High-Touch
Customers**

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Account Executive



Agenda

Mindset Shift – The “Alley-Oop”

Be In the Know

Standardized & Repeatable

Agility is Key

POLL

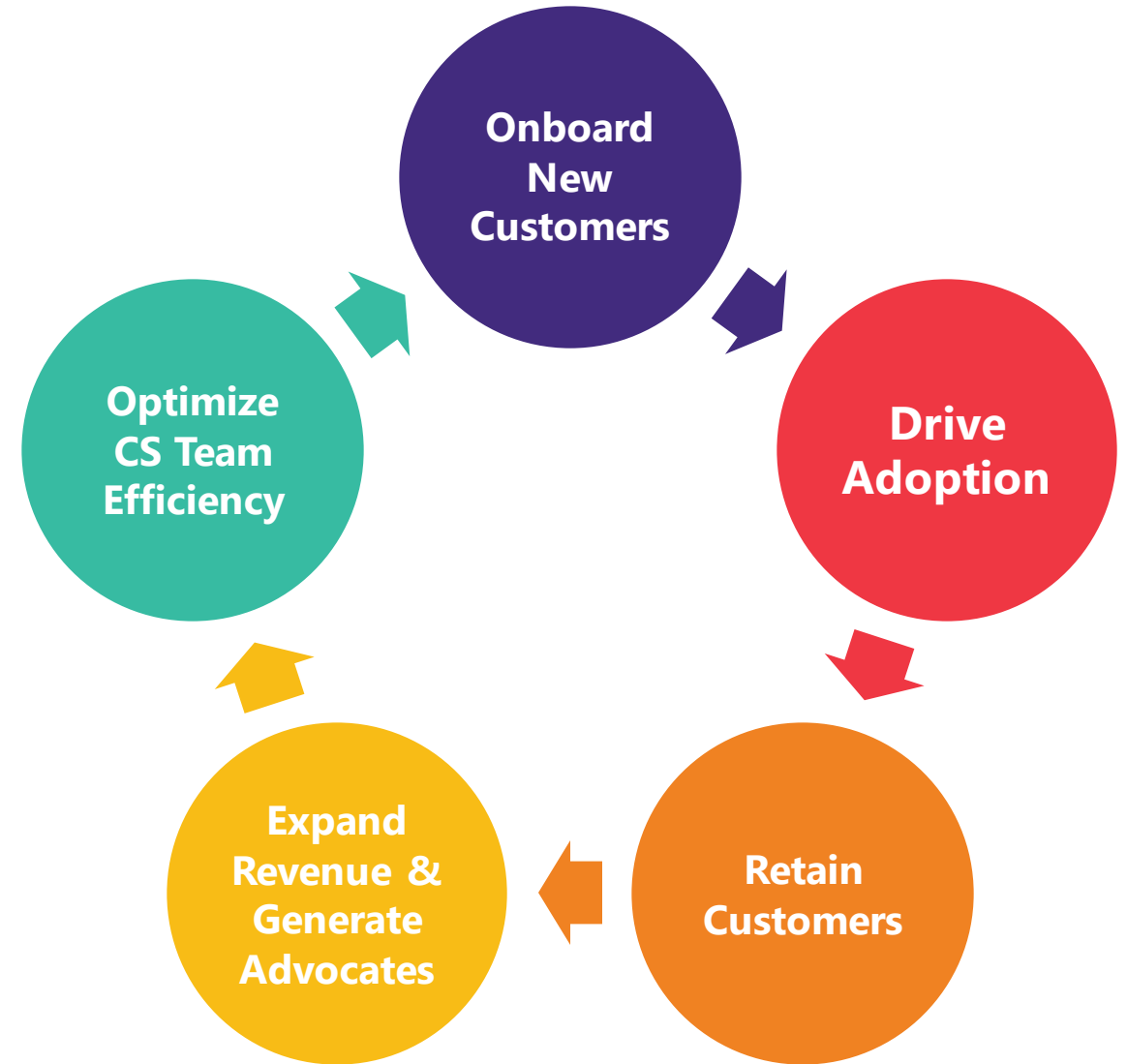
How Many Customers Per CSM Today?

<15

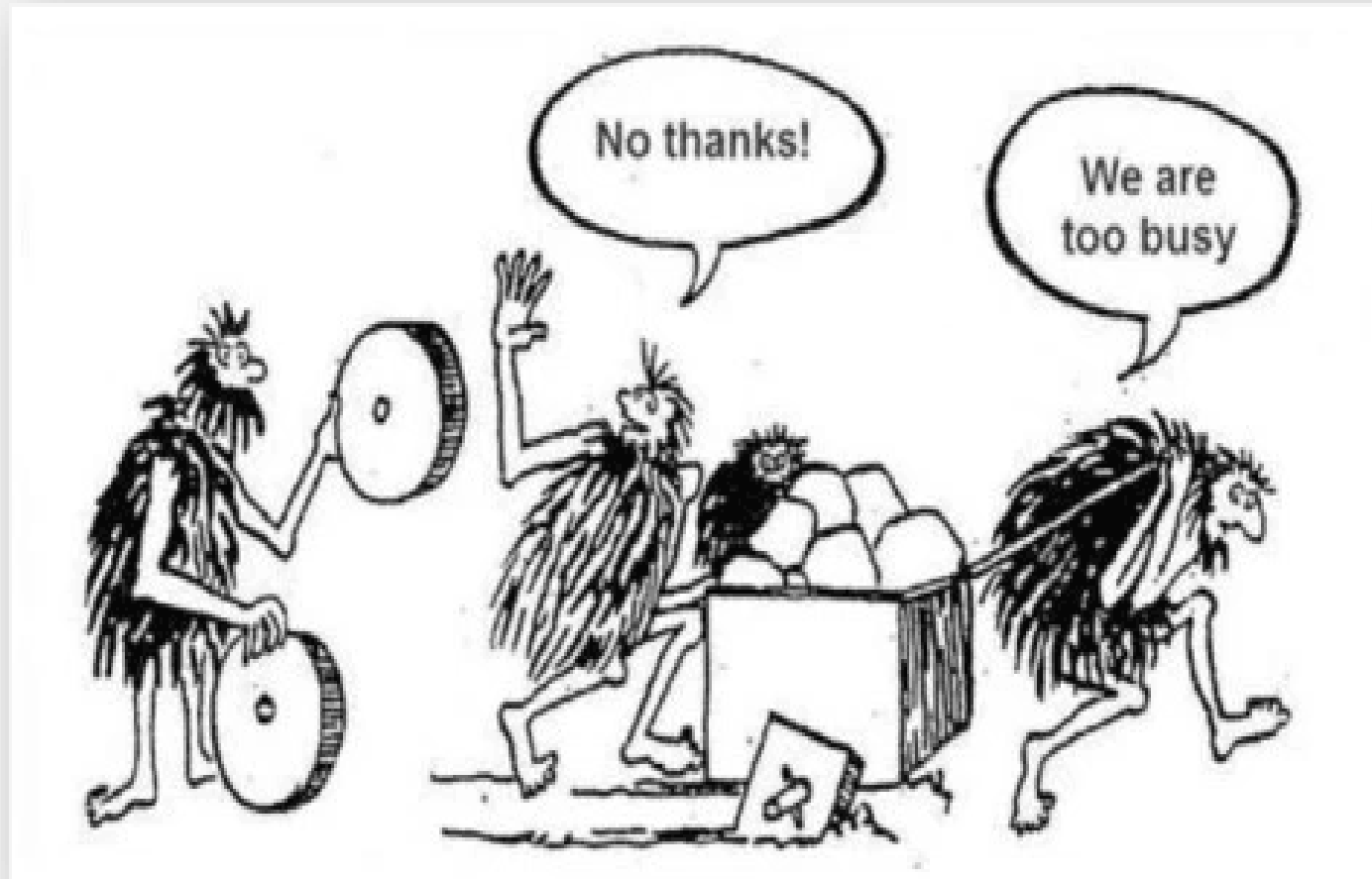
16-30

30+

High Touch Teams: A Lot On Our Plate



Work Smarter, Not Harder





Mindset Shift

Let the automation throw you
the job!

Deeper CSM Insights = More
Seamless Customer Experience

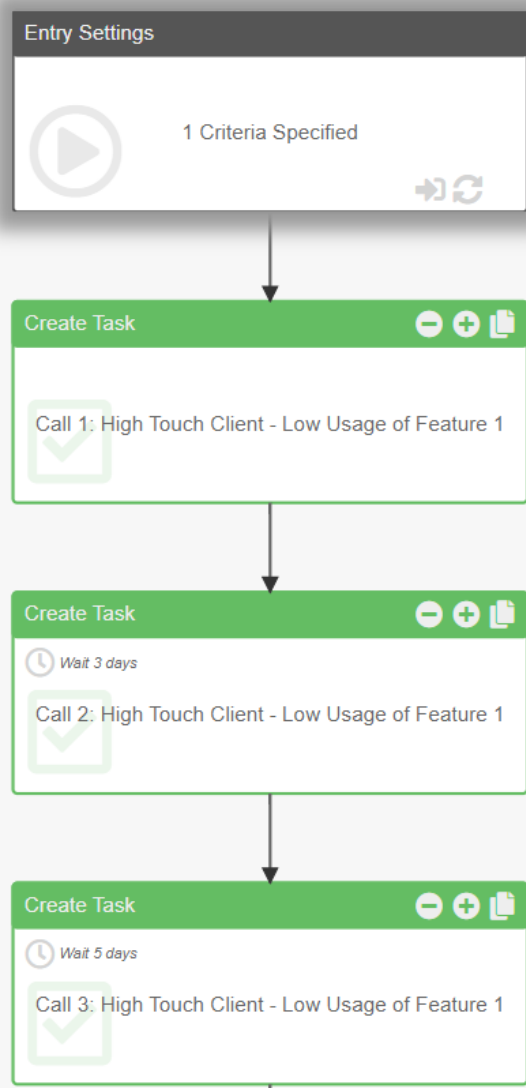
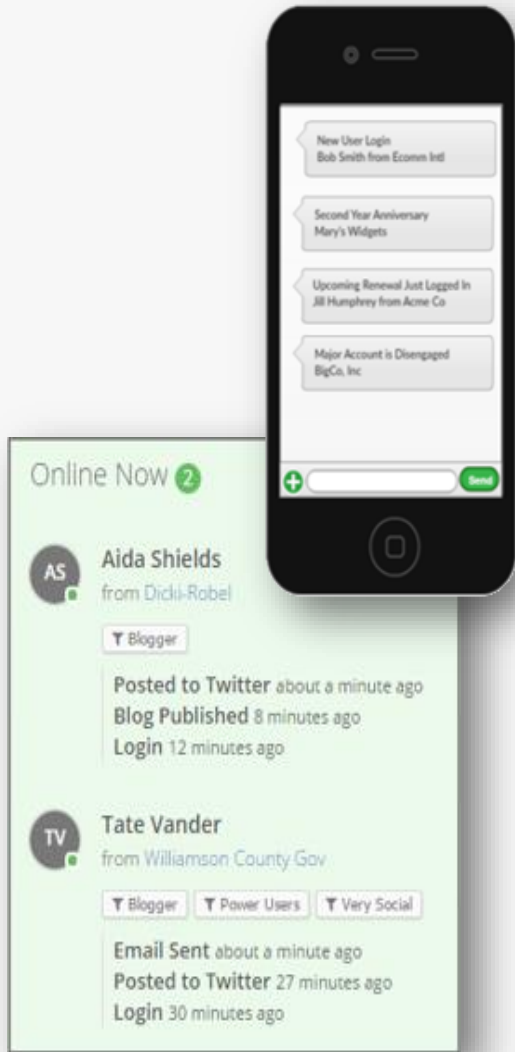
POLL

Have you attempted to implement some sort of automation to your CS process today?

Yes

No

High-Touch Automation – Proven Methods



Be In the Know

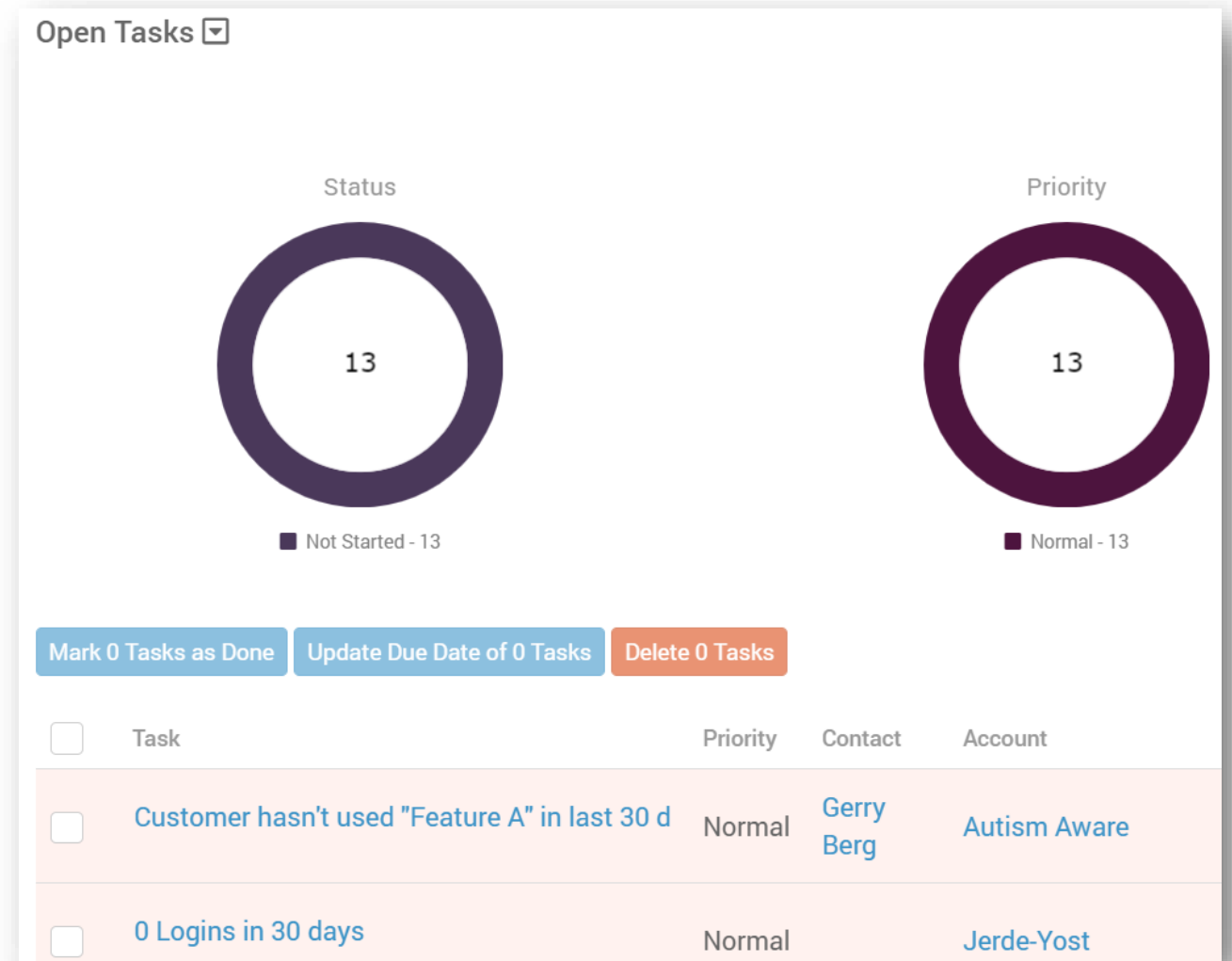
Real time acknowledgement without digging

Act at the right time for the right reason

Take Away the Guesswork

Auto-generated vs. manual



Address high-priority items and act as you see fit



✓ Tasks

Done: 4 (80.0%) | To Do: 1 (20.0%)



- ~~Sales/CS conversation~~ *
Task Deleted
- ~~Send Welcome Email~~ *
Task Deleted
- [Schedule Configuration Call](#) *
- ~~Complete Configuration Call~~ * 
Completed on 4/14/2021 by Crystal Bechtel 
- ~~Complete Configuration Worksheet~~ *
Task Deleted

[+ Add Custom Task](#)

Standardized & Repeatable

Create repeatable processes without scrambling

Clean, consistent experience for your customers

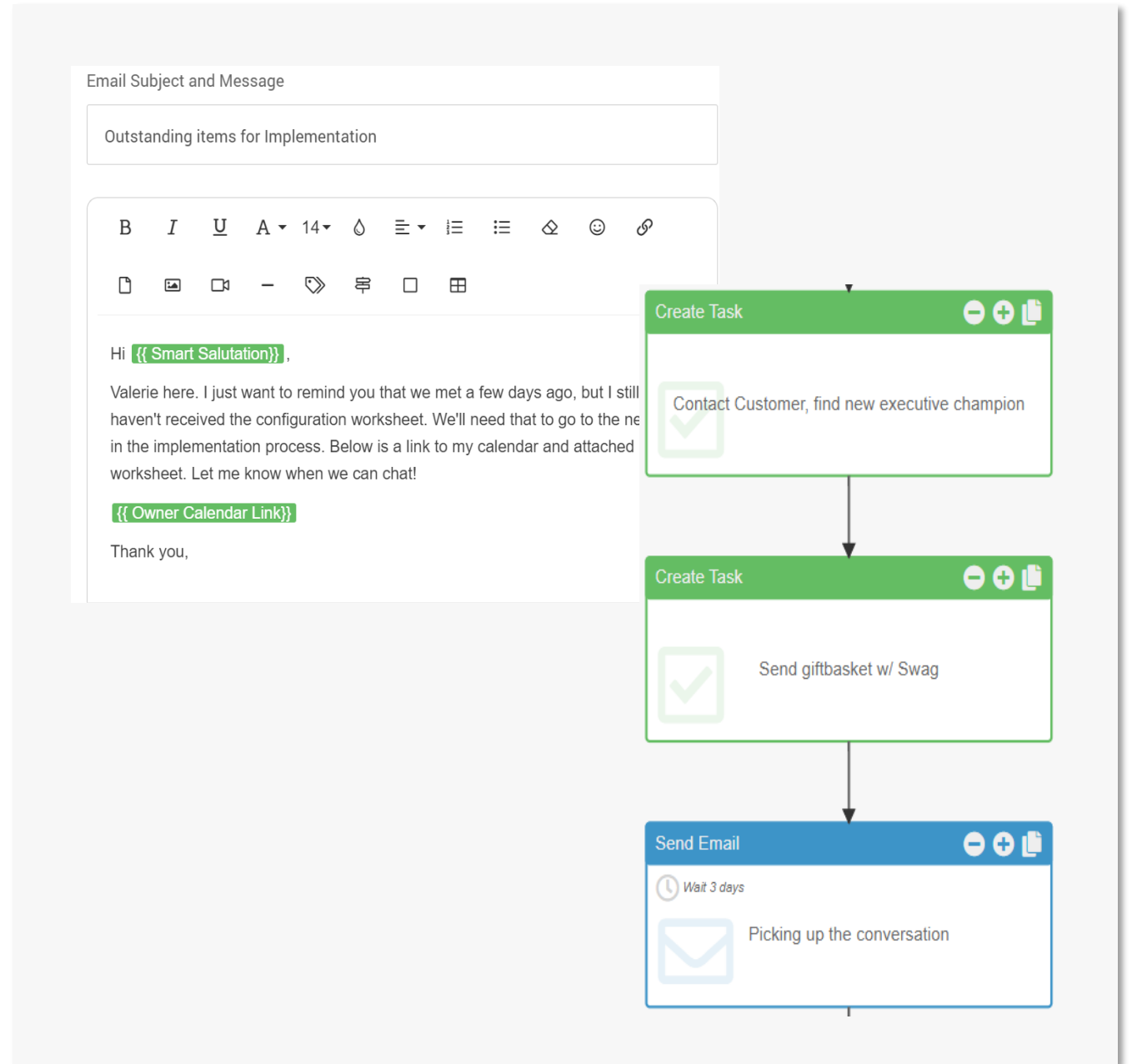
Why reinvent the wheel every time?

Let's Get Agile!

Things don't always go according to plan... but that doesn't mean we can't have one!

Let the automation prompt you on typical best practices

Ex: Onboarding items incomplete, executive sponsor leaves



Automation doesn't have to be scary

Arm your team with repeatable processes

More assisted CS insights = Better customer experience!

Takeaways

An abstract graphic on the left side of the page, consisting of several thin, curved lines in various colors (yellow, orange, red, purple, teal, and grey) that sweep across the frame. Some lines have small dots at their ends, colored to match the line they belong to.

Q&A

Thank You



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