



Digital Customer Success Strategies to Drive User Adoption: Uncovering your data's buried treasure

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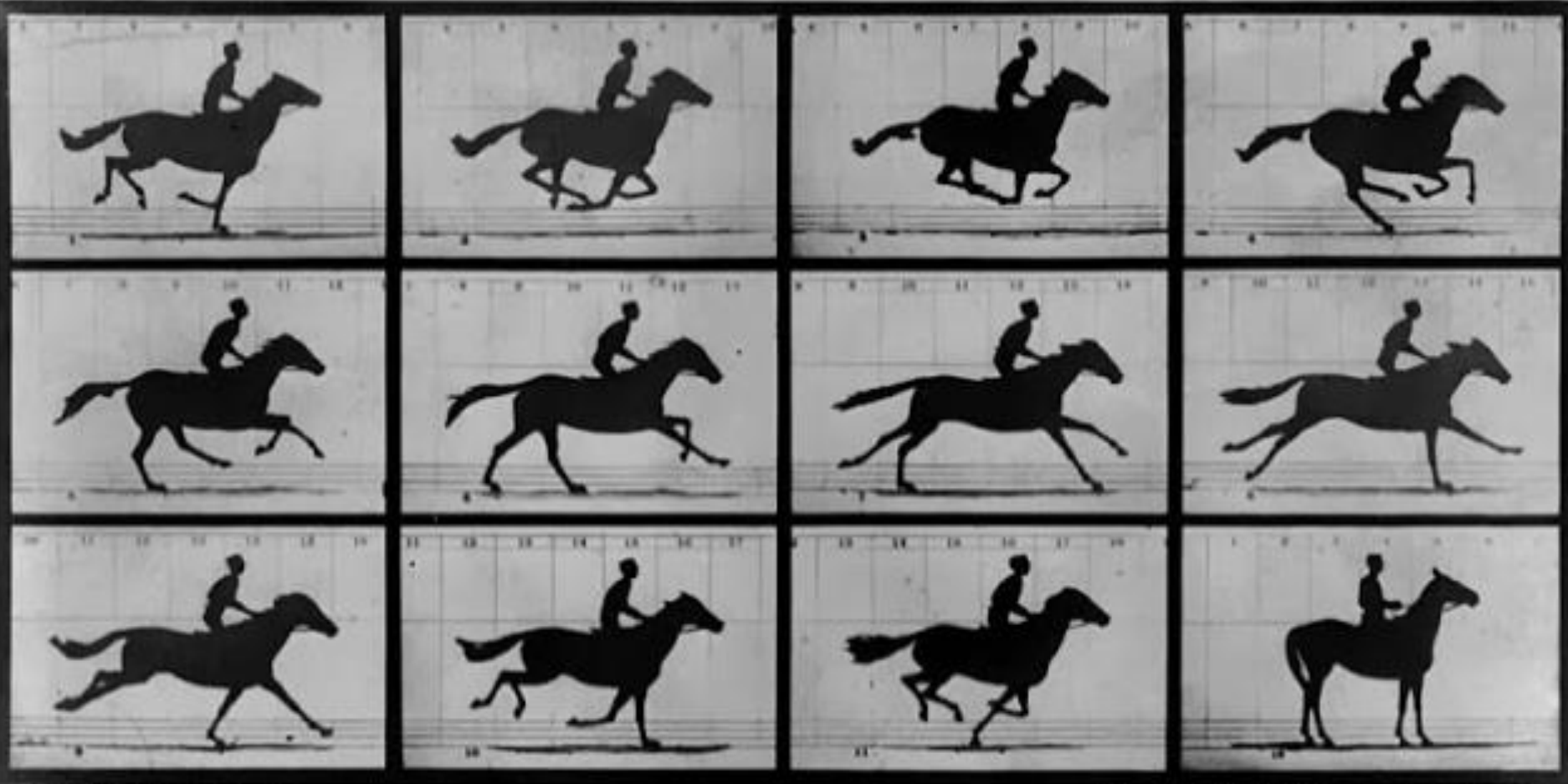
Approaching a Digital Strategy for Adoption

- Start with your Customers' Experience
- Understanding Engagement
- Capture a problem statement
- The toolkit
- How to: Marketing-type Data (E-mail)
- How to: Behavioral/User Data (In-app, Usage)
- The Analysis
- Planning your next steps



Flying Horses: What we think we know





Copyright, 1878, by MUYBRIDGE.

MORSE'S Gallery, 417 Montgomery St., San Francisco.

THE HORSE IN MOTION.

Illustrated by
MUYBRIDGE.

AUTOMATIC ELECTRIC PHOTOGRAPHY.

"SALLIE GARDNER," owned by LELAND STANFORD, running at a 1.40 gait over the Palo Alto track, 10th June, 1878.

The negatives of these photographs were made at intervals of twenty-seven inches of distance, and show the exactly fifth part of a second of time; they illustrate consecutive positions assumed in each twenty-seven inches of progress during a single stride of the horse. The vertical lines were twenty-seven inches apart; the horizontal lines represent elevations of four inches each. The exposure of each negative was less than the two-thousandth part of a second.



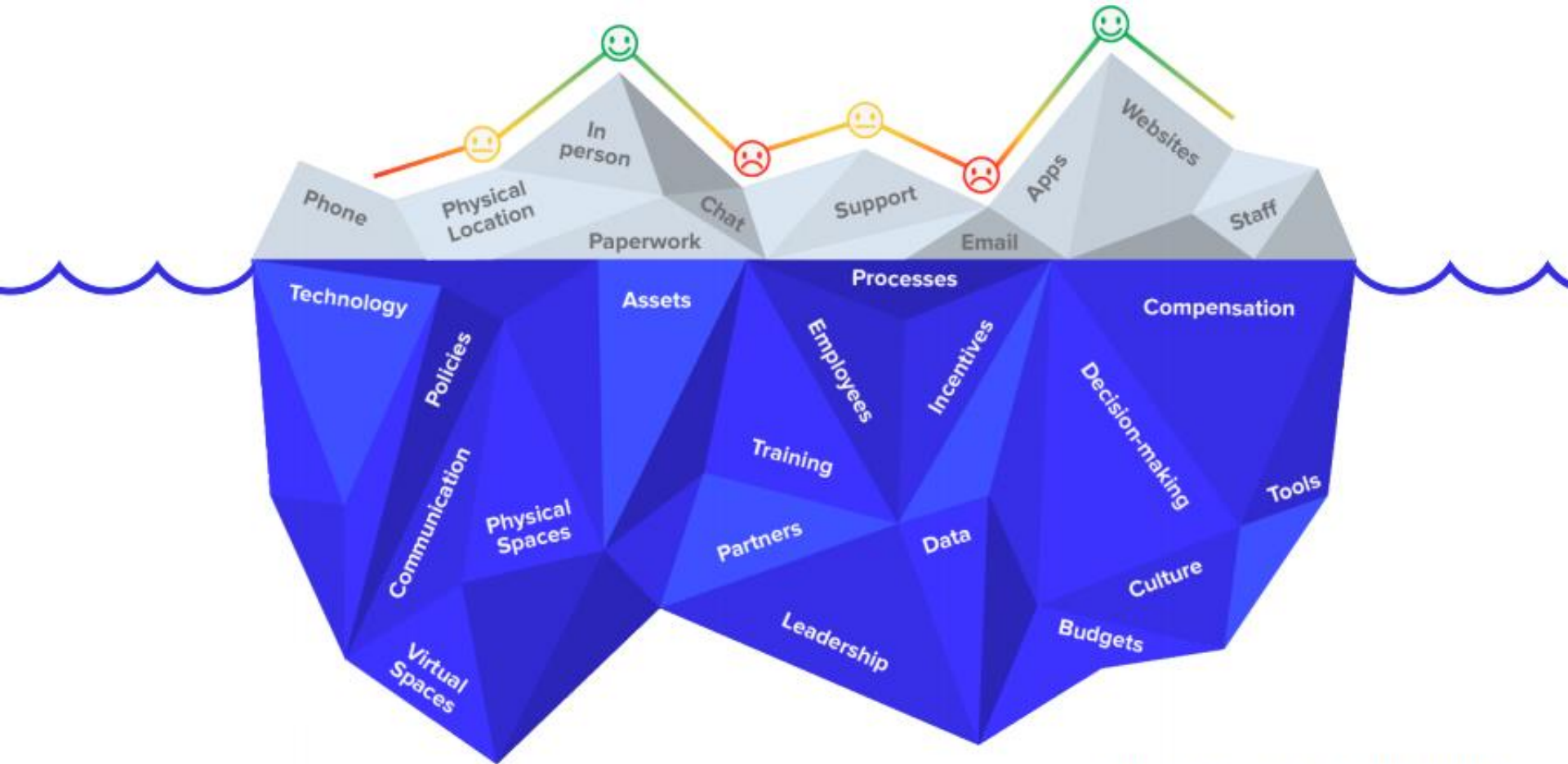
How to think about the whole the Customer Experience



What Customers Experience



What Customers Experience



Why Understanding Engagement is Important



The Importance of Customer Experience + Engagement

Key Performance Indicators Average Per Account

All Accounts

1,257 Accounts

📅 Avg Events	29.34	👤 Avg Active Users	1.28	📅 Avg Active Days	9.05 / 30
🕒 Avg Events / Day	0.95	👥 Avg Active Users / Day	0.36	📄 Avg Event Types	2.09

Low Churn Risk

438 Accounts

📅 Avg Events	53.77
🕒 Avg Events / Day	1.73
👤 Avg Active Users	1.84
👥 Avg Active Users / Day	0.62
📅 Avg Active Days	14.82 / 30
📄 Avg Event Types	2.99

Medium Churn Risk

600 Accounts

📅 Avg Events	21.15
🕒 Avg Events / Day	0.68
👤 Avg Active Users	1.13
👥 Avg Active Users / Day	0.28
📅 Avg Active Days	7.49 / 30
📄 Avg Event Types	1.88

High Churn Risk

219 Accounts

📅 Avg Events	2.95
🕒 Avg Events / Day	0.1
👤 Avg Active Users	0.57
👥 Avg Active Users / Day	0.06
📅 Avg Active Days	1.82 / 30
📄 Avg Event Types	0.88



Problem Statements ...



Problem Statements

- I want to **improve customer experiences** with e-mails and in-app notifications
- I want to **use customer engagement data** to inform how to best communicate with my customers
- I need **different communication channels** depending on stakeholder
- I need to **augment my CS team** with a digital strategy
- I want to see **how effective our onboarding and adoption** practices are
- I want to use data to **improve my visibility** into my customers
- **I don't have access** to my customers user data, but still want to understand engagement



The Digital Getting Started Checklist:

- Clear Goals
- Alignment with CS and Marketing
- Journey Maps
- Workflows
- Clean Data
- Content
- Measurements



Customer Journey at-a-glance

Day 1

Day 365



- Ensure smooth handoff from sales
- Run Implementation
- Define milestones
- Provide tools
- Align on workflows

- Training
- Ensure client is leveraging all needed features
- Provide early health insights



- Mid Cycle Health Check ins - build trust!
- Up-Sell/Cross-Sell
- Get Well Plans
- Leverage data for deeper insights

- Identify risk to renewal
- Identify growth opportunities
- Ensure client is meeting business case
- Execution of plays



- Gather references and advocacy
- Perform renewals motions
- Prepare for growth

Customer Journey at-a-glance – Where to Digitize?



Day 1

Day 365



- Ensure smooth handoff from sales
- Welcome Guide**
- Run Implementation
- Define milestones
- Provide tools
- Align on workflows

- Training**
- Ensure client is leveraging all needed features**
- Provide early health insights



- Mid Cycle Health Check ins - build trust!
- Up-Sell/Cross-Sell
- Get Well Plans
- Leverage data for deeper insights**
- Communicate changes in product**

- Identify risk to renewal**
- Identify growth opportunities**
- Ensure client is meeting business case
- Execution of plays



- Gather references and advocacy**
- Perform renewals motions
- Prepare for growth



Marketing Metrics = Early Engagement Indicators



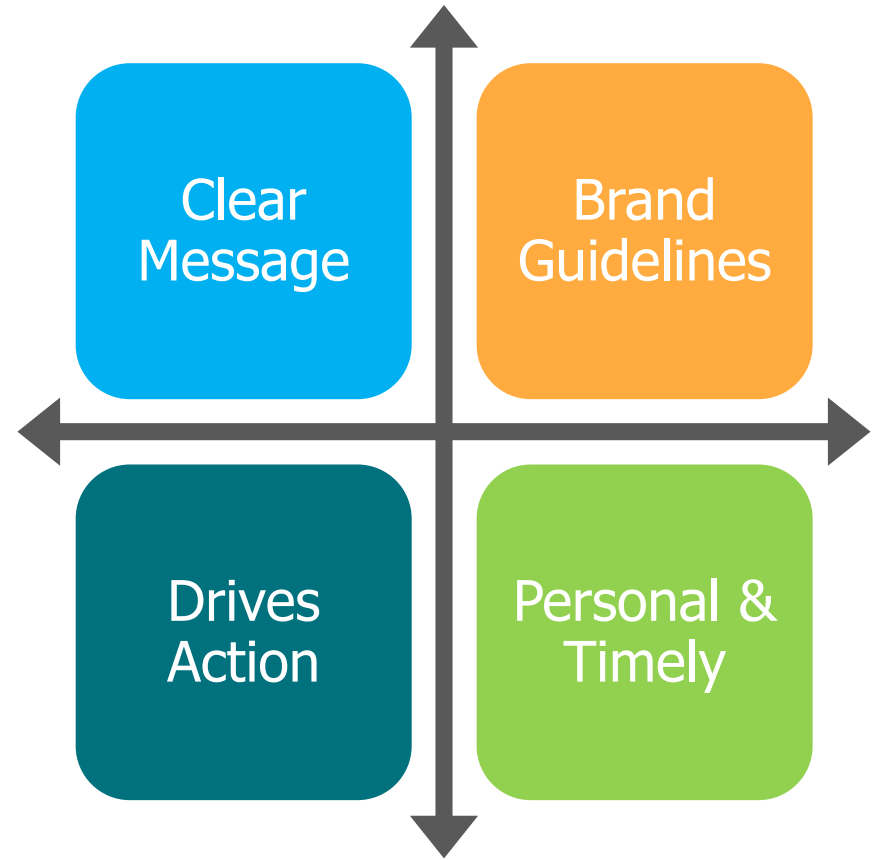
Using E-mail Marketing Metrics for Early Engagement

Metric	Calculation	Analysis
Delivery Rate	# of emails delivered / # of emails sent	Indication of who is receiving your e-mails
Bounce Rate	# of emails bounced/# of emails sent	Do you have the right contact information? Vital to a digital strategy
Open Rate	# of opens/# of emails delivered	Who is opening your e-mails? Hint: Biggest variable is usually subject line. The Better the Subject line, the better the Open Rate should be
Click Through Rate (CTR)	# of clicks/# of opens as a percentage (%)	Once they've opened, who's clicking? (<u>Are they engaged??</u>)
Unsubscribe Rate	# Unsubscribed/# sent	Are you being annoying?



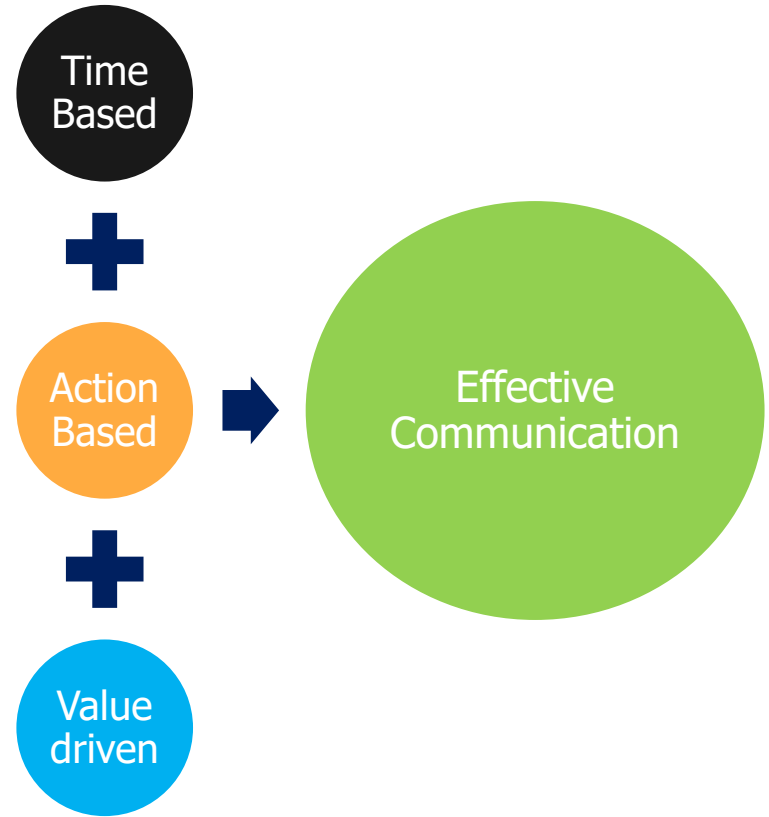
Crafting the Message

1. **CSM's** familiar with the customer should draft the initial version
2. Align with marketing on **brand guidelines**
3. **Review and iterate** early drafts
4. Focus on **tone and feeling**
5. What **actions** are you trying to drive?
6. Make navigating the content **easy for customers**



Message Timing

- 1. Time Based Messages** - A message sent every "x" days. (Not reliant on user data.)
- 2. Action Based Messages** – Communication triggered by a customer's activity. (User data required)
- 3. Value Driven** – Focus on information that is useful/valuable to the client to be more successful ... vs. "checking in"



Case Study: Onboarding with E-mail

Landscape

- On-boarding data not being leveraged
- Data accuracy and health unknown
- Non - Segmented Clients
- Limited Client outreach
- No CSM or On-boarding team in place
- Customer Journey undefined

Approach

- Identified segment of clients
- Mapped Onboarding Journey
- Worked with Marketing on brand guidelines
- CSM driven content created
- Leveraged tool automation
- Tested and iterated

Outcomes

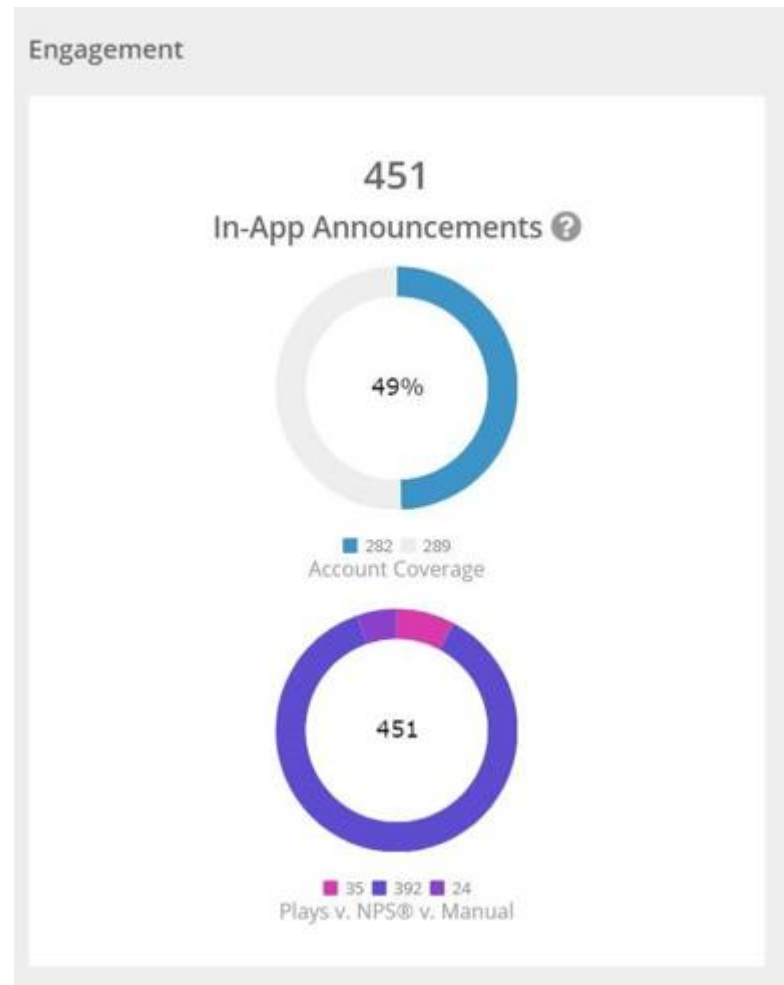
- ✓ Average Time to Register increased by **36%**
- ✓ Open Rate: **64%**
- ✓ NPS Score after 50 days: **35 (Good)**
- ✓ **High Count of Customers** engaged

Driving Adoption with Tech Touch + Behavioral Data



In-App notifications

1. Proactive (Walkthrough Guides, Onboarding)
2. Updates and Alerts (Software Updates, Outages)
3. Data Driven (Triggered by activity)
4. Time Driven (Triggered by a point in time)
5. Measurement (NPS, CSAT)



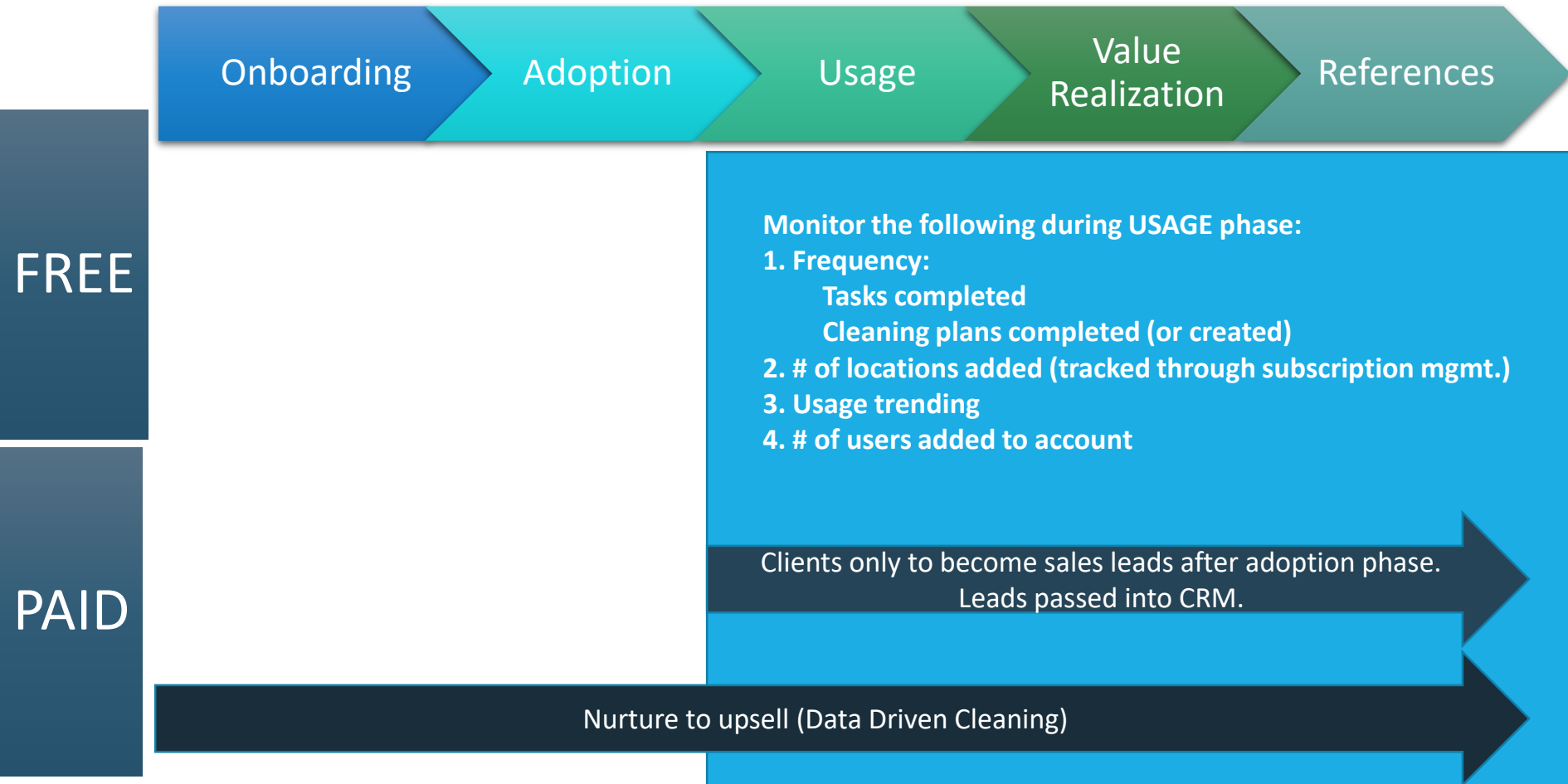
Case Study: Onboarding and Adoption with Tech Touch

The Obstacles:

1. New customers must **self on-board**
2. Onboarding **process is complex**
3. Convert **10%** of free customers to paid
4. **New product** without historical data

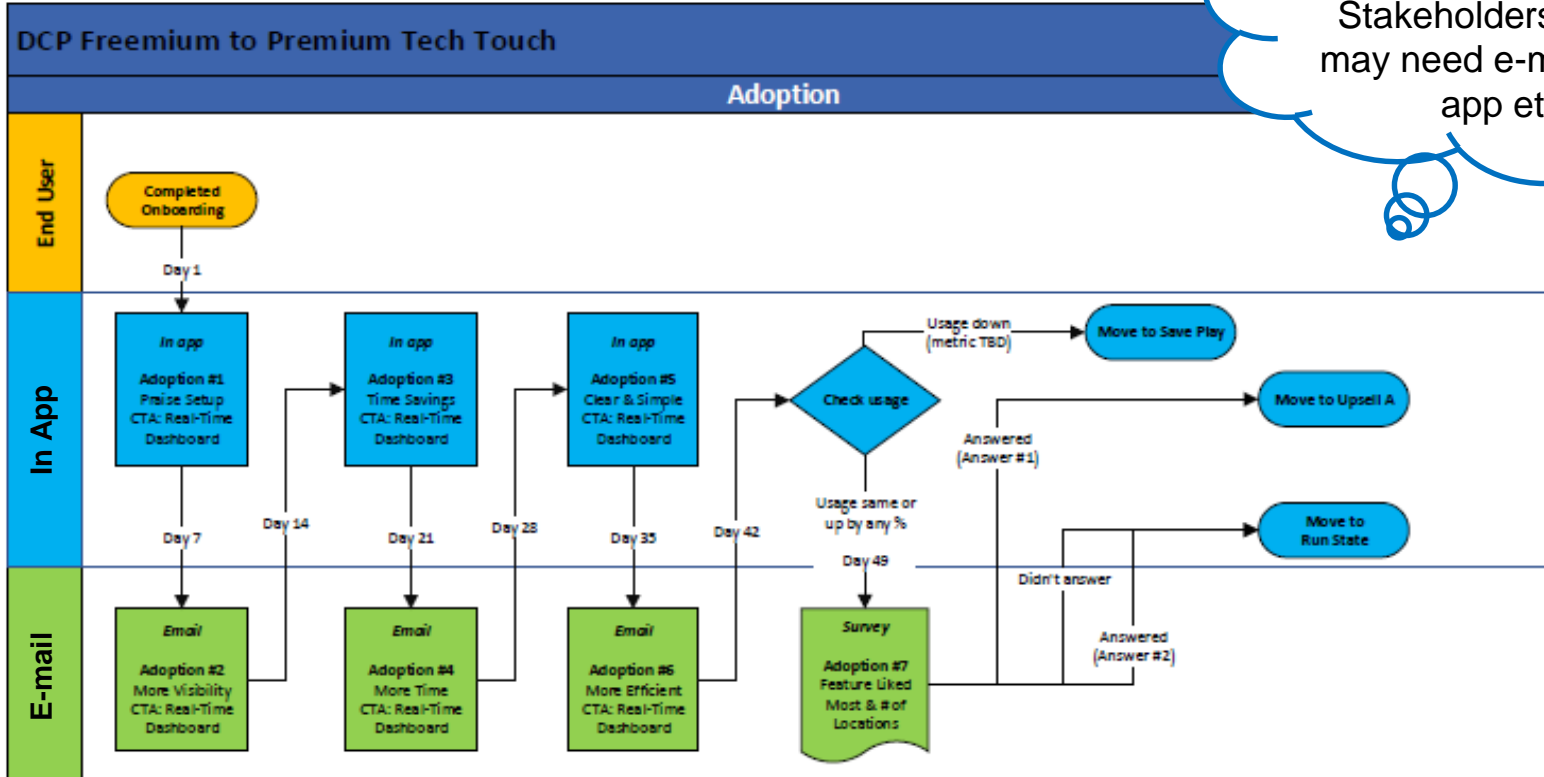


Case Study: Onboarding and Adoption with Tech Touch



The Workflow

Pro Tip!
When picking e-mail vs. In-App, think about Stakeholders. (Execs may need e-mail vs. In-app etc.)



Understanding The Customer Experience

Create login
(FM and
Cleaners)

•Low effort



Create tree

•High effort



Create team

• Medium
effort



Create
Tasks

• High
Effort



Create
Plan

• High
effort



Pro Tip!

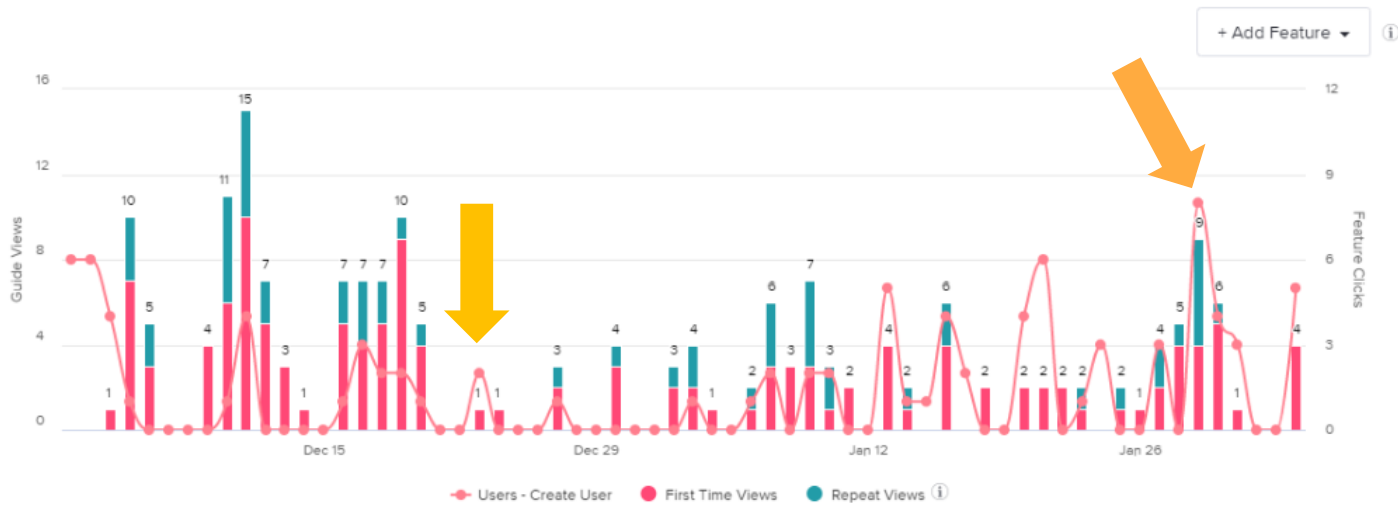
Weigh out the level of effort with the value your customer will get from the action. If Effort is HIGH and Value is LOW, you can expect low engagement

Views + Activity – Correlating the data: Example of an ineffective Communication



Views + Activity – Correlating the Data: Example of an effective Communication.

DAILY → VIEWS → Dec 2, 2019 - Today - Everyone



+ Add Feature ⓘ

132
First Time Views

187
ⓘ Total Views

Current Guide Targeting

1,155 of **1,155**
Everyone Targeted



Measuring Effectiveness of Sequences

WalkThrough Report: New User Welcome

All Accounts ▾

Filter by segment(s)...

Status	ENABLED	Steps	7
Page Name	Dashboard	Trigger	Click
Show	Everytime	Audience	<i>All Active Accounts and Contacts</i>

Began the Sequence

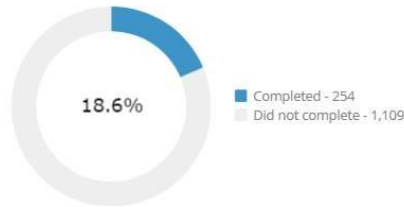
Started 1363 times by 26 contacts



Begins per day last 30 days

Completed the Sequence

Completed 254 times by 14 contacts



18.6%

Completed - 254
Did not complete - 1,109

Abandoned the Sequence

Abandoned 1111 times by 25 contacts (81.5%)



Abandoned at this step

Measuring Adoption – Quick Guide

1. What does adoption mean to **your customer**?
2. What does adoption mean to **your company**?
3. How will you **measure** adoption?
4. How will you use your adoption metrics to **take action**?



Adoption Rate

Time to Value

Usage %



What's next?

1. Create a strategy across Customer Success and Marketing.
2. Understand the tools at your disposal.
3. Map the journey and create meaningful content.
4. Measure effectiveness in driving higher adoption.



Thank you!

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