New to Customer Success Automation?
15 ideas to get started
Customer Success teams contend with a long customer lifecycle: from onboarding to engagement to renewal to advocacy. Customer success automation has arrived and it automates processes and tasks that otherwise would be completed manually.

If you are new to customer success automation, here are some plays you can try.

Brought to you by...
New Account Alerts.
As soon as a new account is assigned, make sure the customer success manager is alerted and can immediately reach out to kick-start the customer relationship. Don’t lose the customer’s momentum and excitement with a delayed transition from Sales to Customer Success.

New User Welcome Messages.
Get new users started right. Greet them the first time they log into your product, introducing the human and technical resources that are available to them. Suggest steps to get started and track if the user follows those steps. Reach out to help them if those steps don’t occur.
Onboarding Milestones.

The first few weeks/months of the customer lifecycle are the most critical. Identify and track key milestones; and as a customer achieves them, congratulate them and push them towards the next one. If a customer fails to achieve a milestone, engage them before they go too far off course.

Trial Guidance.

When a new trial signs up, engage them continuously throughout the tenure of their trial period. Towards the beginning of the period, offer lots of getting started guidance and education content. As their trial ends, remind them to purchase to avoid service interruptions. If a trailer expires without purchase, bring them back with special offers/discounts.
New Feature Announcements.

Help customers explore new features after you release them, instead of wait for them to (maybe) find those features on their own. Track usage of this new feature and automatically ask the most engaged customers for their feedback.

Deeper Feature Dives.

If a customer already uses feature X, could they benefit from also using feature Y? Proactively introduce the customer to this feature Y, explain the benefits and get them started with written and/or video tutorials. Help them discover more value from your product and services by responding to the value that you know is important to them. If feature Y is not included in their current edition/pricing model, offer an incentive for them to upgrade.
Immediately Address Critical Errors.

Every product or service has errors/issues that could be very frustrating or confounding to customers. What are yours? Make sure your CSMs are alerted when these errors occur. Immediately send information to customers on how to address/fix the issue and follow-up with a personal communication making sure everything was resolved. Don’t let errors frustrate a customer and cause them to become disengaged.

Failed Payment / Upcoming Credit Card Expiration.

Losing a customer because their payment failed is avoidable churn. Get in front of expiring credit cards, reminding only the appropriate contacts that this information needs to be updated. Give them easy to follow instructions on how to do this and automatically thank them once they’ve updated.
Identify and Revive the Disengaged.

Don’t wait until a periodic review to discover that your customer is not actively using the product, particularly sticky features. Set thresholds for usage of key features and when a customer dips below these limits, proactively engage them. Focus on the value the feature can deliver, also well as starting small and growing their usage.

Proactive Upsells.

Does your product have limits based on the customer’s edition or amount they are paying (example: number of visits, number of contacts, number of communications)? Don’t wait to ask the customer to upgrade once they have hit these limits and experience potential interruptions in their service. As they approach a limit, reach out in advance to offer to help them upgrade to limits that will meet their growing usage. Be sure to start by thanking them for being so active with your product.
Upcoming Renewal Reminders.

Your customer shouldn’t be surprised when it’s renewal time. Remind them their renewal is upcoming when it’s still a little ways out. Send reminders to only the appropriate contacts and automatically set tasks for yourself to proactively review their ROI and suggest possible upsells.

Upcoming Event Announcements.

Do you have webinars, conferences, user groups, etc that your customers could benefit from? Target the ideal customers for each event and encourage them to sign up by talking to them about how it will help them. After they sign up, send additional information and reminders leading up to the event.
Manager Intro and Feedback

You want your key/most important customers to feel recognized and special. Giving them a direct line to the manager of the CS team is a great way to accomplish this. Have the manager introduce themselves and explain why the customer is valuable to the business. Request direct feedback as appropriate and make sure the customer feels like they have a direct line to the manager.

Power User Recognition.

If you have users/accounts that are particularly active and engaged, it’s important to recognize them and sincerely thank them for their efforts. As appropriate, offer them special access to new releases or opportunities for feedback as a thank you. A little swag can also go a long way.
Seasonal Engagement Opportunities.

Is there a holiday or important time of the year coming up for your customers? Be a resource for them during this time, offering extra help and special resources/guides/webinars. Make sure you are part of their success during time periods that are critical to their business.
Besides everything in this booklet, what can ChurnZero do for you?

Know How Customers Use Your Product / Service.

**Usage Comparison**
Show Last 30 Days among Large Accounts

- Feature 1: 4 (percentile: 76%)
- Feature 2: 26 (percentile: 83%)
- Login: 60 (percentile: 83%)
- Power Feature 1: 20 (percentile: 81%)
- Power Feature 2: 12 (percentile: 30%)
- Power Feature 3: 9 (percentile: 46%)
- Power Feature 4: 25 (percentile: 77%)

Assess Health and Likelihood to Churn.

- 169 Accounts
- $885.3k Total Contract Value

Get Real-Time Alerts About Your Customers.

Segment Your Users and Accounts with a Rich Set of Data.

- Your power users.
  Invite this segment to try your latest product updates before all the others.

- Users who are having difficulty onboarding.
  Automatically set tasks for the Customer Success managers to call these users.

Automate Tasks and Communications and Get More from your Team.

Connect with your Customers Right Inside your Product.
Amanda Rueda, VP of Customer Experience

It has been so refreshing to work with ChurnZero. It brought an ROI return on day one and is something that people really appreciate and enjoy using!

ChurnZero automates a lot of processes that businesses would have had to do manually to keep their customers engaged in their products.

ChurnZero is the "Next Big Thing"

See how we can help you fight churn.

Get a demonstration:

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