



One bullet-proof way to land + expand your SaaS customers.

What is customer success intelligence?

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You're in the people business.

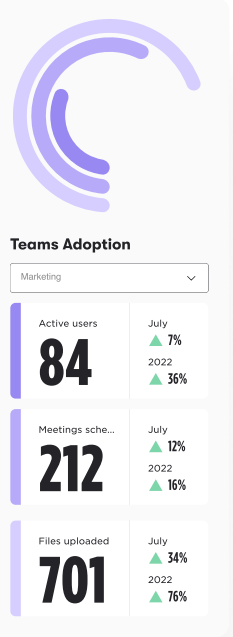
Right ... ?

Well, kinda. You're really in the people influencing business, and I'll tell you why. See, to renew a customer, you have to showcase the software's value — and to do that, you need to pique their interest.

I know ... it's not that easy.

You can't read customers' minds. And you're dealing with limited resources, here. The truth is that SaaS companies don't invest much in retention. Only about 10% of SaaS revenue is spent on customer support.¹ Given SaaS annual churn rates are roughly 32%-50%, that's not enough.²





Enter customer success intelligence - a data-driven way to help SaaS companies get the most out of their renewals using an automated learning platform.

In this guide, you'll discover why the status quo undermines your renewals, how to use customer success intelligence to unlock your team's potential, and how it all leads to higher annual recurring revenue (ARR).

Discover the future of customer success, sales, and marketing teams.

Then see why Microsoft, the largest SaaS company in the world, is using customer success intelligence to gain widescale adoption.



Customers have changed. SaaS orgs haven't.

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Buyers are liars.

Or, at least it can feel that way. See, in SaaS, your customers are so self-directed. They can jump forward (and backward) in the customer renewal process. At any time.

That makes your job hard.

Why?

You can think they're way further in the renewal cycle than they really are, and then lose them. Almost, without warning.

Plus not all accounts are created equally, so it can be really hard to focus on the right clients. You want to spend more time on the big accounts that need white-glove treatment to renew. But, you know that if you're not reaching the smaller, more transient accounts ... they'll be neglected.

That's a problem, and it's not even your fault.

The SaaS industry has built up a Customer Success Manager (CSM) model that's not sustainable. It's based on reaching a book of accounts per CSM, or by ARR. In the first option, every customer is treated the same ... whether they have 100 or 100,000 users. In the second option, you need a lot of CSMs.

That's a missed opportunity.



It's time to rebuild the customer success engine.

There's a better way.

Your customer-facing teams need data + intelligence. To know what buyers are doing and to change user behavior before they're ever set to renew. When you drive value at the deepest level a software renewal just becomes the next, logical step.

Picture this.

You're driving by a new restaurant when you see a long line winding around the corner. Are you curious? Yes. The same concept holds true in software. People who visit your product, and see value — will tend to draw a crowd. That network effect will then whet your customers'

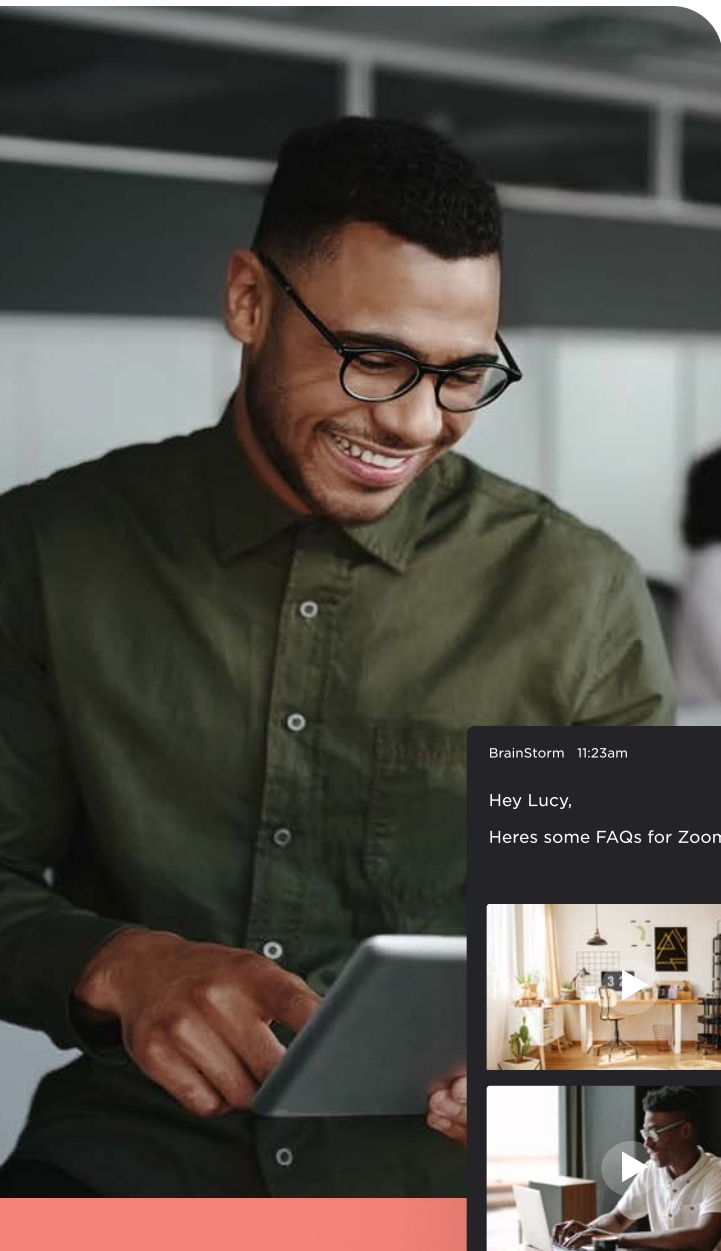
appetite for higher license levels and more SKUs. It's called social liking, and Robert Cialdini can tell you all about it.

But, it's never been possible to harness that kind of buzz for SaaS software.

Until now.


Customer success intelligence to the rescue.

There's a new way to solve this old problem of — “how do I make customers renew?” Customer success intelligence pulls together data and behaviors to train your users to become masters of your software.



BrainStorm 11:23am

Hey Lucy,
Heres some FAQs for Zoom.



What is customer success intelligence?

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Customer success intelligence captures customer behavior inside of your software. It uses data to flag their interactions, and then points them to appropriate training materials. They apply these learnings to become infinitely better in your software and more likely to renew.

It's a better option.



Many firms have tried to fill this gap with Digital Adoption Platforms (DAP) and typical client success tools. These can help you to train people once they're already in your software, but they can't reach the people who aren't. For that, you need a customer success intelligence model that is purpose-built to drive a meaningful change in user behavior - of their proficiency, today.

How does a customer success intelligence platform work?

Earlier, I talked about Microsoft.

Now, let's take a look at their world-class SaaS engine. In this case, they're using customer success intelligence to help with their go-to-market model.

It adds to their insights, helping Microsoft to gain widescale adoption as users better understand their products, and then expand their reach.

Here's how it works.

The image displays a user interface for a customer success intelligence platform. On the left is a dark sidebar with navigation icons and a menu. The main area shows a 'Create Flow' workspace with a grid background. A flow is being designed, starting with a green 'Start of Flow' box. The flow includes three steps: 1. A video step titled 'Zoom Get Started with Zoom' (5:40 duration). 2. An assessment step titled 'Zoom Webinar Warm Up'. 3. A survey step titled 'How proficient do you feel with Zoom?' with options: Beginner, 2 Intermediate, and 3 Master. A red circle with '+415' is overlaid on the bottom right of the flow. A large orange arrow points from the 'Start of Flow' box to the survey step. The interface includes tabs for 'Design', 'List', and 'Preview', and a top navigation bar with 'Configuration' and 'People' sections.

Content

Flows

Events

Resources

Resources >

Zoom Get Started with Zoom

Zoom Webinar Warm Up

Zoom How proficient do you feel with Zoom?

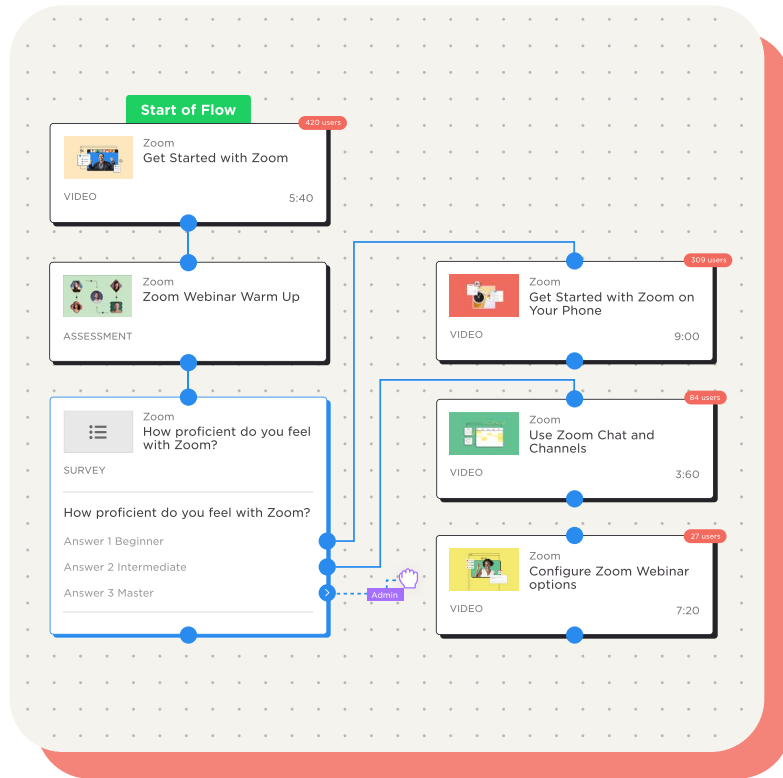
Beginner

2 Intermediate

3 Master

+415





Then, you point them to the right, or new, action you want, using training videos or documents.

It's that easy.

Everything lives inside of a platform, so you can add and remove content whenever you'd like.

- Want to onboard new users?
- Need to share a new software update?
- Have customers you're worried aren't going to renew?

So, what's the secret sauce?

Flows.

These are automatically triggered actions to train your users. Think of personalized emails sent to each user to help change or reinforce behavior. You identify the behavior you want.

Add the appropriate content to the portal.

Each of your users will be tagged with the appropriate status. So, as soon as they take the action you want, they'll be sent to the right content, at the right time, to be trained.

That's it.



Make your company better, faster, and stronger.

The status quo for customer success has been stuck, for too long.

It's forced our high-quality customer teams into a corner, trapping them into deciding who to help — and who to ignore. They're overworked and overwhelmed, trying to spend time wisely.

You can break that cycle.

Use the newest technology to build better, stronger, and faster teams than you've ever had. Customer success intelligence captures everything you need to make a renewal

happen and makes users experts in your platform. Everyone wins. Your team focuses on top accounts. Automation does the rest.

Gone are the days of manual follow-ups and de-prioritizing accounts that matter.

Customer success intelligence harnesses automation to free your teams from shallow work. So, you can focus on what really matters. You'll see better-trained users, which leads to higher retention, longer lifetime value, and a higher ARR, as the value of your software is clearly seen over time.

What are you waiting for?

[Learn about customer success intelligence.](#)

