

Selecting a Customer Success Platform



The Ultimate Guide to
finding the right Customer
Success software

 **Reptrics**

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Overview

Given you choose to read this guide, you are already aware of the worth of Customer Success as a functionality. Fast forward to today when more and more B2B SaaS businesses have started seeing customer success as a revenue center rather than a cost center, businesses have started doing better in retaining their customers and driving revenue. Today's SaaS businesses are as good as their tools when it comes to delivering the best experience to your customers.

Implementation of customer success as a practice might vary from business to business depending on the size, resources, and goals. But the core idea of customer success stands the same. Customer Success software is built in keeping with the same cognition.

The idea of this guide is you make you aware of all the parameters that you should be considering while you take a step forward to choosing the right Customer Success software for your business....

1. Does my business need Customer Success Software?

The approach to Customer Success is to be proactive. And to be proactive you need to have signals to act upon leading indicators of risk to proactively intervene with your customers without them raising a support ticket. According to [Deloitte's](#) predictive insights on Customer Success trends, Digital-led Customer success is one of the top-five forefronts in enabling customer success.

A customer success Technology gives the power to scale customer success enablement by automating workflows and touchpoints. Allowing access to real-time customer health and building interactive dashboards for holistic visibility of customer's account portfolios.

A crucial step to choosing the best fit Customer Success Technology for your business is to evaluate challenges specific to your business needs that you're trying to solve.

Challenges come in all shape and size, some of them could be-

“We predict that the bulk of customer success motions will be delivered digitally moving forward, across all coverage models: high-touch, low-touch, or self-serve. As customers expect more insights, self-service, and integrated experiences, a digital-first approach will be at the forefront of delivering customer experience.”

- **Losing out on early warning signals from churn**
- **Missing out on renewal and upsell opportunity**
- **CRM is not enough**
- **Losing out on early warning signals from churn**
- **Disconnected Customer Experience**



1.1 Losing out on early warning signals from churn

According to Fred Reichheld, creator of Net Promoter Score, “By Improving Customer retention by 5%, your company’s profit can go up by as much as 95%”

You want to be taking the next best action by identifying the signals of churn by tracking product adoption. With more and more data piling up within your spreadsheet(if you’re still using spreadsheets to track customer engagement), It becomes a tedious task to detect which of your customers needs the handholding, when, and why.

Customer success software oversees the product adoption pattern of your customer and provides you with insight so that you can take the next best action to avoid churn.

1.2 Missing out on renewal and upsell opportunity

According to Bain & company “Increasing customer retention by 5% can lead to profits increasing by 25%-95%”.

Retention is the lifeblood of a SaaS business. Technology enables you to track usage limits of your product to identify if your customer is ready for an upsell. With the product usage data, you can better understand the engagement level of accounts just by monitoring data.

1.3 CRM is not enough

Businesses that use functionality within their CRM might help them track customer health. But beyond that, a CRM fails to bring in insights on other leading indicators of churn and opportunities for renewal. Which is not sufficient.

1.4 Lack of Customer Visibility

To provide your customers with the best experience you need to take a holistic view of your customer's unified data without having to switch to different platforms. Without which it is near to impossible to forecast a renewal and upsell opportunity and identify red flags for churn. single platform access for all.

1.5 Disconnected Customer Experience

Cross-functionality engagement is one of the dominating challenges that prevails in customer success delivery resulting in poor customer experience. When multiple teams are involved in customer engagement across different channels it is important to keep a periodical sync and coordination within the teams. This is where a technology jumps in by enabling single platform access for all.



2. How do I determine if my business is customer success technology fit?

A few factors to identify the readiness of your business for a Customer Success Software-

1. Customer Success Strategy

Adopting a Customer Success technology is dependent on your business's customer success strategy. It depends on the customer engagement model you've chosen to interact with your customers.

Are you working low-touch or high-touch or a combination of both?

If a large part of your customer interaction involves human intervention, it is likely you are working high-touch. Where more personalization is required for high-revenue generating customers.

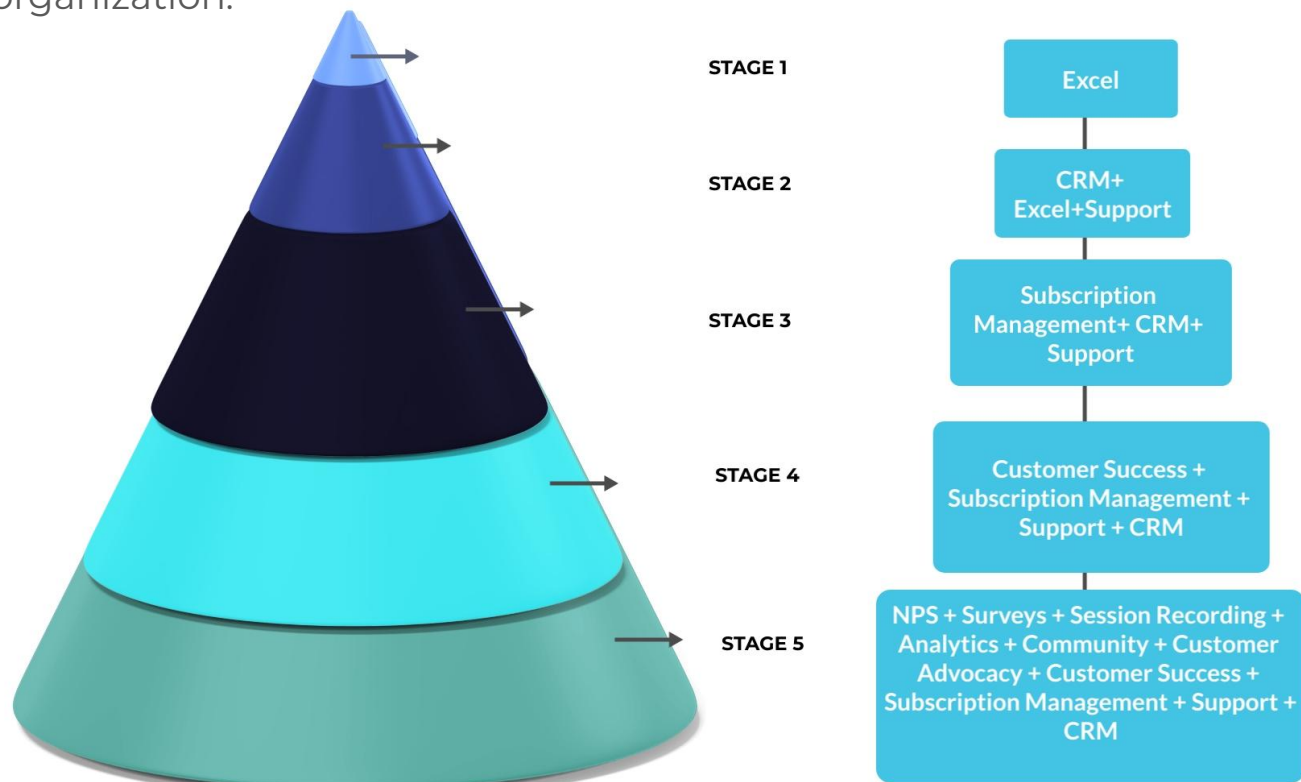
For example, enterprise-grade software using high-touch onboarding for high-value customers depending on your CS strategy.

Whereas, when you want to be engaging with your customers who are at risk. Based on factors such as product adoption and health score. You require a Customer Success Platform that helps you automate your engagement with a large number of customers.

A combination of both models is when you automate a task and monitor it in order to generate triggers or create tasks to bring in human intervention.

2. Customer Success Technology Maturity model

Based on different growth stage of your SaaS business, you need to understand when is the right time to bring in a Customer Success Tool. Let us dive deep into the different levels of Technology adoption within a SaaS organization.



Stage 1: Excel only

Less than 10 paying customer in this stage you can manage customer data using advanced excel.

Stage 2: CRM+ Support+ Excel

When you have 20+ paying customers you need to be thinking about support and success. It is advisable to hire your first CSM as soon as you reach 10+ paying customers. Once you reach 20 customers it becomes challenging to manage tickets let alone by the development team. You need a support tool to manage support tickets.

For a fact, CSM can easily manage customer support using a CRM tool to get visibility on ticket data and determine product usage.

Stage 3: Subscription Management + CRM + Support

Although it is safe to have a Subscription management tool as soon as you hit 10 paying customers. A CRM can double up as a billing management tool to give visibility on renewal timelines and invoices. A subscription tool in place will prevent you from missing out on renewal and invoices, especially with a monthly subscription.

Stage 4: Customer Success + Subscription Management + CRM

At this point your business has grown mature enough in terms of complexity of user base, customer volume & size. The customer Success team is having issues dealing with onboarding and product adoption. Pulling dashboards on top of analytics and CRM tools can no longer suffice to provide a 360-degree view of your customer account.

Your customer success teams need more automated workflows to be more efficient and proactively engage with customers. It is advised to bring in Customer Success software to integrate with your entire technology stack to give you a 360-degree view of your customer portfolio, monitor account health scores, and create playbooks to facilitate onboarding, renewals, and upsells, set up alerts for risk and upsells, and more.

Stage 5: NPS + Surveys + Session Recording + Analytics + Community + Customer Advocacy + Customer Success + Subscription Management + Support + CRM

This is what a fully loaded Customer Success technology stack should look like. With a mature Customer Success technology stack and a defined CS team hierarchy, you can take a step ahead in making a billion-dollar SaaS company.

3. What to evaluate in a Customer Success software?

3.1 Data & Integration

As we have talked about in the previous section about the Customer Success Maturity Model, a bare minimum capability of any Customer Success software should allow integration with the existing technology stack to be able to pull in relevant customer data into your customer success platform.

When it comes to bringing in data, the first thing that you should be checking is the quality of integration the platform provides.

Platform in Action-

Should allow seamless integration capability.

Should allow integrations with these tools-

1. Subscription Management Software
2. CRM software
3. NPS/Survey tool
4. Analytics or BI tool
5. Support or communication tool

3.2 Customer Onboarding

[Customer Onboarding](#) sets the tone for the entire customer lifecycle. One of the major onboarding successes is defined by providing early time to value to your customers. This is where customer success software comes into action. It allows you to create playbooks and build customer journeys to navigate the customers through each stage of their journey.

As each stage in the customer journey needs to be time-tracked Customer Success software helps you track where your customer is in their onboarding journey and evaluate onboarding success by getting triggers as your customer hits milestones. Thus helping you to understand the next best action to deliver the early time to value and be able to act proactively

Platform in action-

Should allow you to build playbooks and set defined milestones within timelines.

Should allow the creation of multiple stages within a playbook.

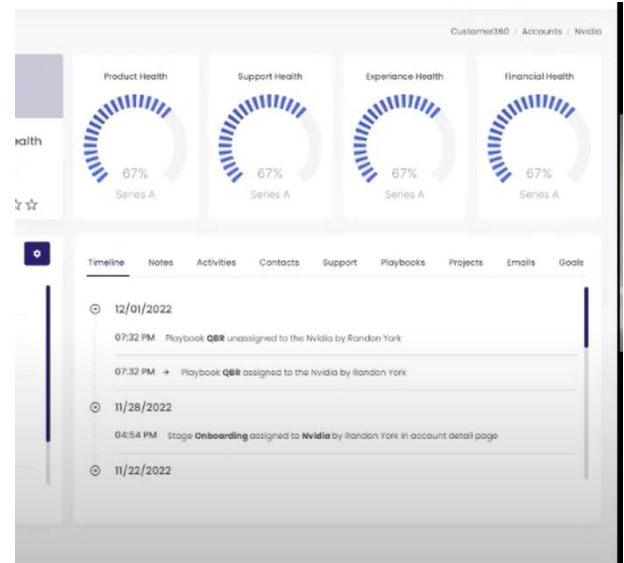
3. What to evaluate in a Customer Success software?

3.3 Customer Health

By being able to fetch information on customer health, you can not only decode renewal and upsell opportunities but can also forecast churn events beforehand. Any good Customer Success software comes with a crucial feature (Identified by the holistic name of “Customer 360”) that gives you a comprehensive view of a customer account's entire health. Typically the 4 dimensions of health as financial health, support or service health, product health, and experience health, or you can have your own sets of leading indicators of customer health as your customers, product, and business growth.

Platform in action-

Should be capable of analyzing data points and past behavior of customers to give an accurate and unbiased health score.
Should allow you to configure data parameters



Provides holistic customer health view considering different health parameter such as Financial, Support, Experience, Product.

3.4 Reporting & Analytics

The analytics and reporting component of Customer Success software fosters the ability to translate customer data into reports that helps to understand customer behavior and make data-driven decisions. A CS tool allows you to forecast renewal and identify revenue risks by letting you visualize account-level and user level reporting. As a Customer Success Leader, you want to be analyzing trends on change in customer health scores, and milestones and keep track of customers' relevant activities across different customer segments.

Platform in action-

Should allow making customizable dashboards

3. What to evaluate in a Customer Success software?

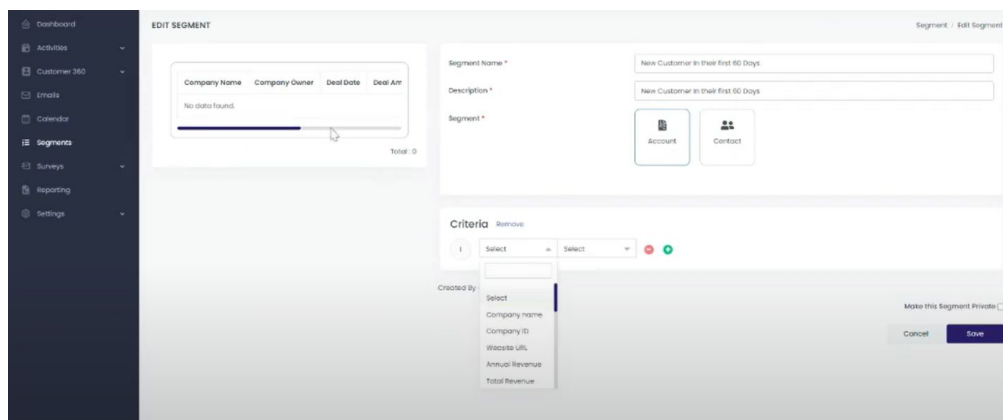
3.4 Segmentation

It is tried and justified how segmentation can help with providing a better and more personalized customer experience. Customer Success software must provide the ability to segment customers based on similar characteristics. This will allow you to proactively help new customers successfully adopt the product.

Platform in Action-

Must have account and user-level segmentation

Should enable the automatic movement of accounts within different segments within the customer journey.



Allows account level + Customer level segmentation based on different criteria

3.7 Scalability of the Platform

You need to be watching out for tools that provides scalability in terms of functionalities. As your customer team goals and objectives would grow with time you want to be choosing a solution that can support your scalability.

3. What to evaluate in a Customer Success software?

3.6 Customer campaign

Customer campaign component of a Customer Success tool comes with an automated marketing feature to drive product adoption and advocacy to drive success at scale. Rather than relying upon a marketing tool to run customer nurture campaigns, you can stick to your customer success tool to create nurture tracks for onboarding customers along with keeping a track of campaign goals using interactive dashboards. Measure the effectiveness of your campaign and analyze the impact without switching to a marketing tool.

Platform in Action-

Must have built-in Email

Come with multiple email-design and templates

Allows campaign goal setting and conversion tracking.

3.5 Automation

Customer Success tools should allow you to automate tasks like:

- Assigning accounts to team members (for example, problematic customers to more experienced CSMs)
- Sending messages to customers with low engagement
- Getting notifications if certain Health Scores drop under a defined value
- Creating tasks for CSMs to proactively get in touch
- Identifying upsell and cross-sell opportunities
- Filtering for very healthy customers that are good candidates for referrals, case studies, testimonials, etc.

4. Choosing the right customer success platform for my business

Why choosing the right cs platform is important for your business?

With a plethora of tools available in the market, it is easy to get baffled. You need to be choosing the right fit for your use case, challenges, and business goals. You don't want to be overspending. Our platform is specifically designed to help companies manage and support their customers, and drive business growth and success. With our software, you can gain detailed insights into your customers' behaviors and preferences, and identify potential issues or opportunities for improvement. Real-time notifications and alerts ensure that you never miss a chance to provide timely and personalized support to your customers.

How Reprtrics is meeting your needs?

Our support ticketing and management tools make it easy to track and resolve customer inquiries and issues, while automated communication and engagement tools help you to stay in touch with your customers and provide personalized support.

In addition to these key features, our software also provides tools for managing and organizing your customer success team and streamlining processes and workflows to improve efficiency and productivity. With our customer success software, you can take your customer experience and account management to the next level, and drive business growth and success.



4. Choosing the right customer success platform for my business

How Reprtrics is meeting your needs?

Let's dive into some of the specifics of how Reprtrics perform all the functions talked about above.

1) Onboarding:

Reprtrics' sophisticated onboarding playbook automates the monitoring of product adoption and advances the account through the onboarding process. We employ automated playbooks in automated onboarding to lead the user through the onboarding procedure. Risk alerts are sent through playbooks and journeys, which reduces the amount of time needed for onboarding. Automatically sends out welcome emails, training materials, and onboarding messaging.

What you get: **Playbooks for automating customer onboarding**

What it helps achieve:

- **Provide time-bound success plays to customers.**
- **Reduce time to value by up to 30%**

Automated playbooks are nothing more than a list of steps that must be completed to complete repetitive tasks. Having a playbook can help you develop a scalable customer success process. It helps to accomplish successful automated customer onboarding, create, manage, and assign tasks

Reprtrics Ease of Setup: **To begin your automated onboarding, use prebuilt email templates or lessons.**

Segmenting During Onboarding Made Easy:

- Using the segments, automate the transactional emails
- Establish product adoption benchmarks to track the account's development.
- In the event that any user misses a milestone, create risk warnings.
- You will have proactive and prompt communication with customers who have fallen behind in their journey

4. Choosing the right customer success platform for my business

How Reptrics is meeting your needs?

2) Account Health

Every day, Reptrics assesses the Account health. It keeps track of everything, including relationships, finances, and the adoption of new products. so that there won't be any surprises when the renewal dates arrive.

Real-time account health monitoring

- Every customer segment has particular needs that are specific to that segment. You can define health differently for each part using Reptrics. Obtain the accurate picture that applies to that area.
- Integrate customer interaction, customer financials, customer support requests, and product adoption to track data from all pertinent systems.

360 Account Health

- Track usage patterns, significant usage frequency & trends, and license utilization to determine the health of your product adoption strategy.
- Monitor financial indicators such as revenue trends, unpaid invoices, and days since the last renewal to determine your financial health.
- Track crucial open tickets, the frequency of new dialogues, and the trajectory of the satisfaction score to determine health services
- To determine the health of a relationship, track signals such as touchpoint frequency, recency of touchpoints, and touchpoint by channel.

4. Choosing the right customer success platform for my business

How Reprtrics is meeting your needs?

3) Retention

Put churn under control. Guesswork regarding Renewal ends.

Track the health of each account and foresee churn. Receive instant risk notifications. Recognize Who, When, and Why needs hand holding. De-risk accounts through proactive measures. Without waiting for the consumer to submit a support ticket, unlock value for each customer.

What it does for your CSM: **Reprtrics does not abandon the CSM to sift through a sea of statistics and data. Without any setting, it bubbles up the appropriate data point for the appropriate account at the appropriate moment.**

Get ahead with data-driven risk alerts.

Be Warned if they stop logging in, if an account stops using a certain module if usage of a certain feature falls below the cutoff, if a cutoff if a renewal is due if a payment is past the due date, or even if they completely stop utilizing a certain feature.

Reprtrics lets you:

- 1) **Check an account's health in real-time 360:** Keep tabs on each account's financial, relationship, and product adoption trends.
- 2) **Immediately assign accounts to CSM:** depending on established criteria, such as customer segment, industry, and region, assign accounts to the CSM.
- 3) **Organize and schedule each CSM's day:** Organize and prioritize unexpected, unscheduled tasks into a success plan and tasks.
- 4) **Set up a personalized risk score for the account:** Create a custom risk score and tags for accounts that indicate a similar risk or confidence context. It also weighs in CSM sentiment.

4. Choosing the right customer success platform for my business

How Reprtrics is meeting your needs?

4) Upsell & Expansion:

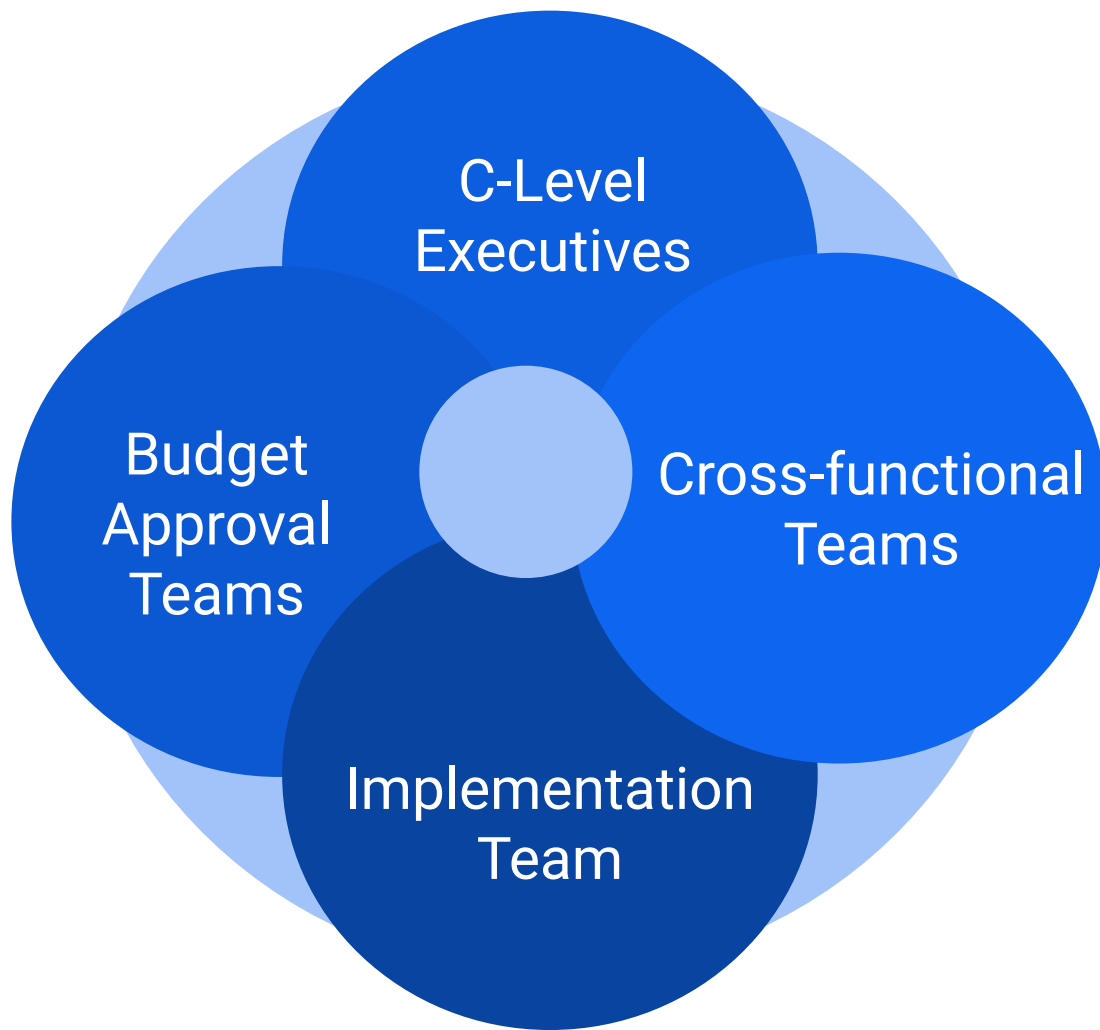
Grow your MRR by monitoring expansion opportunities. Reprtrics helps you determine which accounts to upsell and create automated tasks to assign to your team.

Monitor product usage and create upsell segments

- Create an upsell segment to track accounts for upsell signals. Get a forecast of when to upsell and to which account
- Monitor product usage to determine the engagement level of an account. Determine which account is ready for upsell
- Create alerts for high usage statistics

5. Getting stakeholders involved in buying a CS Platform

Now that you have a fair idea of what the tool evaluation process looks like, it is time to think of how you could get your cross-functional team and budget approval executives involved in buying the right chosen product for your business. The right approach and strategy is the key to winning approval. There are typically 4 different teams or team members involved in buying a Customer success technology.



5. Getting stakeholders involved in buying a CS Platform

In order to make the process smooth and involved, you need to present “How and what value the tool is going to bring in for them?” You need to address relevant pointers to the stakeholders they’re most concerned about. The table below will help you with approaching stakeholders and teams with the relevant information.

	Stakeholders	What they care about	How to sell to them
1	CEO, CFO, CTO, etc.	• ROI • Company Goals	• Case Studies • Show data around CS tech adoption by
2	Budget Approval Teams	• Revenue Growth	• Show how CS is a profit centre • CSMs increased
3	CSMs	• Makes their Job easier	• Thorough Demo of the platform with them • Talk about scaling early

Conclusion

We hope, by now you are loaded with relevant information to go about evaluating and choosing the right-fit Customer Success tool for your organization.

As you move ahead with your journey to the digital transformation of your customer success department, defining customer success processes and workflows remains the top priority.

Fastest-growing SaaS businesses of today are choosing Reptrics to grow their revenue and prevent the risk of churn.



Reptrics Focus