Uberflip: a Case Study in Scaling Customer Success

Amity

Highlights

Situation

Uberflip, a fast growing content experience management company, needed a better way to manage its 1,700+ customers. In particular, it wanted to implement an efficient system to prioritize account management so it could focus on higher-revenue customers.

Solution

Amity provides Uberflip with extensive and real-time insight and information about the health of its customers. This makes it easy for Uberflip to identify potential problems before they become critical, and capitalize on opportunities to better serve large customers.

Impact

Uberflip has embraced a focused and structured approach to drive customer success and better customer engagement, while dramatically reducing churn.

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Engagement – in terms of the number of customers we're able to connect with in a given month – has gone up dramatically since implementing Amity. And it's entirely a result of the increased visibility we have into which customers need our attention and why.
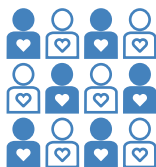
Sam Brennand,
Director of Customer Success, Uberflip

Situation	Solution	Impact
1,700+ Customers	How healthy are your customers?	Increased customer engagement Reduced churn

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Leaving the Whiteboard Behind

A whiteboard can be valuable tool for fast-growing startups looking to brainstorm and generate new ideas. But using a whiteboard to track the health of more than 1,700 customers is probably not the best tool.

For Uberflip, a 30-foot long whiteboard was their customer success "system". When the company brought on a new customer, a sticky note would be created – the color determined by the sales rep involved.

"Heaven forbid a sticky note became less adhesive or I forgot to put sticky note on the board – you would lose track of the process," said Sam Brennand, Uberflip's director of customer service.

"Since day one, we've known we needed a tool like Amity."

Recognizing that the whiteboard's utility had reached its usefulness, the Toronto-based company, which offers a content experience management platform, decided it needed a better (and less manual) way to manage customer success. Uberflip needed powerful customer success software.

"First and foremost, it was a growth problem," Brennand said. "In the early days, we tried our best to remember which accounts needed our help. But even when the team scaled to seven people, including two full-time customer support staff, it was impossible to do."

After reviewing a number of options, Uberflip selected Amity – a decision driven by Amity's powerful workflow capabilities, real-time customer intelligence, and cost-effectiveness.

"Since day one, we've known we needed a tool like Amity," Brennand said. "If we wanted to transition from small startup into a high-growth organization that did customer success the right way, we needed a tool that could scale with us."

Embracing a World-Class Customer Success Platform

As Uberflip sees more demand from companies looking to create, manage, and optimize content experiences to generate more leads, Amity is playing a key role in helping Uberflip create a rock-solid foundation to scale and accelerate. In particular, Uberflip is capitalizing on Amity's SmartPlaybooks™, a powerful system to create automated processes, task generation and actions based on customer behaviour, customer outcomes, or a variety of internal metrics.

"Amity does workflow management a lot better than other customer success management tools," Brennand said. "Before Amity, it was a struggle to see where our customers were in their journey with us. Now, that information is automated and at our fingertips."

Uberflip is also reaping the benefits of Amity's dashboard, which provides a user-friendly way to track key metrics such as customer progress, revenue, health, product usage, activity and engagement.

Armed with better insight and knowledge about the health of its customers, Brennand said Uberflip can anticipate potential problems before they become critical, and, as important, capitalize on opportunities to help customers get more value from the platform, including offers to upgrade to premium services.
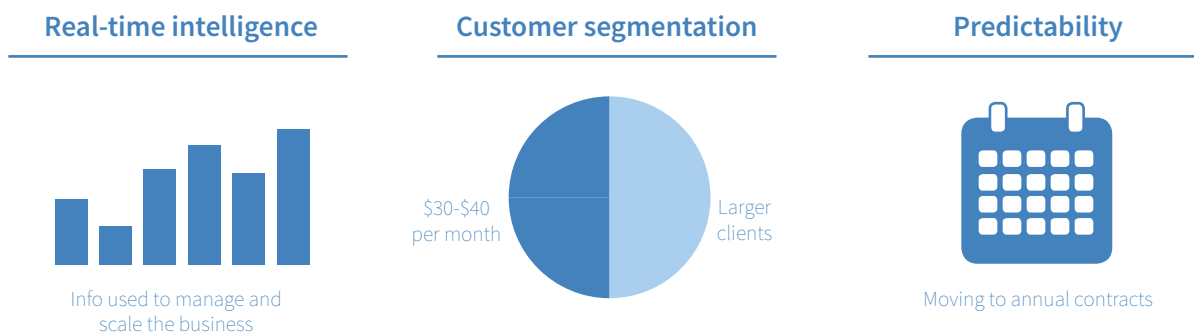
Segmenting the Business for Growth Opportunities

With real-time intelligence into customer outcomes and health and how much recurring revenue each customer contributes, Amity is playing a key role in helping Uberflip manage and scale its business.

The ability to segment is important because Uberflip's business is divided into two distinct parts: legacy customers who pay legacy prices, and professional content marketers and brands with significantly higher monthly recurring revenue. Using Amity, Uberflip can now efficiently manage its portfolio of customers and prioritize more effectively.

"From a business standpoint, it's hard to justify providing the same level of service for lower-MRR customers. It just becomes unprofitable," Brennand said. "Amity helps us prioritize tasks based on monthly recurring revenue."

Uberflip is also using the insight delivered by Amity to migrate its customers from monthly billing to annual contracts. Brennand said it is a major advantage to know what is happening with a customer's contract well in advance, rather than taking last-minute actions.

Real-time intelligence	**Customer segmentation**	**Predictability**
Info used to manage and scale the business	$30-$40 per month / Larger clients	Moving to annual contracts

Driving Better and More Customer Engagement

One of the biggest improvements in how Uberflip has operated since it implemented Amity is significantly higher customer engagement. Rather than making, at best, educated guesses about the status and health of customers, it has become easier for account managers to identify priorities and embrace a coherent and consistent approach to customer success.

The ability to dynamically establish priorities is how Amity delivers value and differentiates it from rivals. This gives customers the power to focus on the right customers at the right time.

"After just a few weeks of using Amity, we noticed that the number of customers we were engaging with went up dramatically," Brennand said. "And it's entirely a result of the increased visibility we have into which customers need

our attention and why. When you use Amity every day, it really starts to change behaviour."

Another key benefit is how Uberflip has been able to embrace a collaborative approach to account management. Rather than looking intently at the white board for guidance, Uberflip can effectively do weekly account reviews to focus on potential problems and identifying opportunities.

From a business perspective, Brennand said a 40% to 50% reduction in churn over the past four or five months has been a game-changer for Uberflip – a development in which Amity has played a key role.

About Amity

Amity provides the world's most powerful Customer Success software. Amity, senses changes in customer health or rhythms, recommends the right actions and measures effectiveness. The combination of real-time playbooks, intelligence and automation helps customer success organizations scale quickly and efficiently. Since 2012, Amity has been on a mission to make customer success the focus of every business everywhere. Amity's customers increase adoption, renewals and revenue growth by earning the trust and confidence of their customers every day. www.GetAmity.com.