

THE FOUR STAGES OF DIGITAL CUSTOMER SUCCESS MATURITY

1 EMAIL CAMPAIGNS

YOU HAVE INFORMATION. YOU HAVE YOUR CUSTOMERS' EMAIL ADDRESSES. WITH THAT AT YOUR FINGERTIPS, THIS IS THE PERFECT PLACE TO BEGIN YOUR DIGITAL CS JOURNEY. IT'S OKAY TO START SMALL! SOMETHING IS BETTER THAN NOTHING.

10%

EXAMPLES

- CUSTOMER NEWSLETTER
- PRODUCT ANNOUNCEMENTS
- FEATURE HIGHLIGHTS
- CUSTOMER 'THANK YOU' NOTE

2 CSM TASKS

BY AUTOMATING REPETITIVE TASKS, CSMs CAN SPEND LESS TIME ON TEDIOUS TO-DOS AND MORE TIME HAVING PRODUCTIVE STRATEGIC CONVERSATIONS WITH YOUR CUSTOMERS.

40%

EXAMPLES

- INTRODUCTION EMAIL
- QBR SCHEDULING REMINDER
- CHURN RISK ALERTS
- USAGE-BASED EMAILS

3 SELF-SERVICE

BY ENABLING CUSTOMERS TO FIND ANSWERS AND SOLVE PROBLEMS INDEPENDENTLY, YOUR CS (AND SUPPORT) TEAM WILL INCREASE EFFICIENCY AND BE ABLE TO FOCUS ON HIGHER PRIORITY ITEMS.

70%

EXAMPLES

- CUSTOMER COMMUNITY
- KNOWLEDGE BASE
- PARTNER WITH SUPPORT

4 NEW CHANNELS

ONCE YOU'VE BUILT A STRONG DIGITAL FOUNDATION, THE FUN PART BEGINS AND THE POSSIBILITIES BECOME ENDLESS! EXPLORE NEW AND INNOVATIVE COMMUNICATION CHANNELS AND METHODS.

100%

EXAMPLES

- IN-APP NOTIFICATIONS
- SLACK OR TEXT MESSAGE
- ADVANCED AUTOMATION

DIGITAL CUSTOMER SUCCESS DOESN'T MEAN THAT YOU'RE REMOVING PERSONALIZATION FROM YOUR CUSTOMER RELATIONSHIPS. IN FACT, IT SHOULD DO THE OPPOSITE - AUTOMATION SHOULD ENHANCE YOUR ABILITY TO COMMUNICATE WITH CUSTOMERS AT JUST THE RIGHT TIME WITH JUST THE RIGHT MESSAGE, ALL WHILE FREEING UP YOUR FRONT-LINE CSMs TO SPEND THEIR LIMITED TIME ON THE MOST CRITICAL WORK AND THE MOST VALUABLE CONVERSATIONS.

BUT DIGITAL MATURITY DOESN'T HAPPEN OVERNIGHT, AND CONTRARY TO POPULAR BELIEF, IT'S NOT ONE-SIZE-FITS-ALL. IT TAKES TIME, EXPERTISE, ENERGY, AND THE RIGHT SET OF TOOLS, AND IT ABSOLUTELY MUST BE TARGETED TO YOUR BUSINESS AND THE UNIQUE NEEDS OF YOUR CUSTOMERS.

START WITH THE LOW-HANGING FRUIT OF TIME-BASED EMAIL CAMPAIGNS, THEN BUILD UP TO SUPPORT THE AUTOMATION OF REPETITIVE CSM TASKS, SELF-SERVICE CUSTOMER RESOURCES, AND EVENTUALLY, ON TO EVEN MORE ADVANCED CHANNELS.