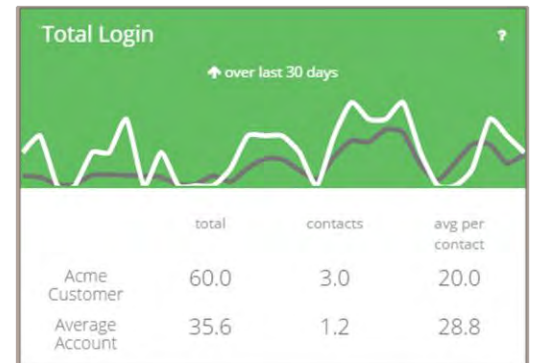


Visibility is vital: real-time usage insights facilitate meaningful engagements

The Best Practice

For most subscription businesses, a customer's success is highly correlated with their use of the business' product or service. But for many customer success (CS) teams, insights to their customer's usage data is elusive. Some fly blind with no data at all, while others get periodical updates that stale quickly.



Productive CS teams insist on real-time usage insights, as they see its link to a productive and successful customer relationship. Knowing when important events happen, as they happen, empowers CSMs to advance desirable usage patterns, fend off potential problems or frustrations, and have meaningful engagements.

What Cision Did...

Cision is a global leader in public relations and marketing software, with a product line that covers all aspects of a business' communication needs. Cision helps their customers reach, target and engage their audiences.



While Cision boasts a large, pro-active account management group, the team struggled to understand how their customers use their products. Monthly summaries of basic account usage were available, but account managers needed to manually audit each account for the most up-to-date information. Too often, account managers were having customer conversations without having enough insight into how the customer was (or was not!) engaged with their offerings.

To solve this problem, Cision's account management team developed a list of the critical data for their reps, including:

- Positive events, such as when a customer used a sticky feature for the first time and when a customer had noteworthy success with one of their campaigns,

- Negative events, such as when a customer had problems or errors with the service,
- Neutral events, such as reports shared or search terms refreshed.

This data came together to create a clear picture of the customer's usage over time. The team is now better informed during normal customer engagements and has real-time alerts that gives them a heads-up when critical milestones happen.

How You Can Start...

When starting to track customer behavior, avoid the temptation to collect all the data possibilities. Prioritize your requests based on what information could have the biggest impact to your ability to effectively service customers.

Like Cision, develop a prioritized list of requests that includes:

- Positive events to open up discussions about ROI and additional features,
- Negative events to drive discussions on best practices, avoid customer frustration and head off churn, and
- Neutral events to give the CSM a clear understanding of engagement over time.

Once you have the data, however, you can't stop there. In order to have a positive impact on your customer relationships you must purposefully work this data into your daily processes. Set clear rules for what events CSMs need to be proactively tracking and guidelines for how they can most effectively use the data at their disposal.

Having access to real-time usage data brings a real clarity to our conversations with customers. The visibility is the difference between a small, dirty portal and expansive, floor-to-ceiling, pane-glass windows!



Kurt Wyckoff
Director of Client Development
Cision



Ask ChurnZero how we can support real-time insights from your service and help your CSMs fight churn, like we did with Cision.