

CUSTOMER



AdStage is a closed-loop reporting and automation platform for paid marketers.

- **BUSINESS:** B2B SaaS
- **FOCUS:** Marketing
- **LOCATION:** San Francisco, USA

CHALLENGE

AdStage wanted an efficient way to understand customer health so the Customer Success team could better prioritize their time and efforts.

SOLUTION

AdStage implemented Natero to track customer engagement and drive CSM processes using proactive alerts, playbooks, and workflows.

RESULTS

The CSM team can proactively engage low-adopters, identify power users, and spot potential candidates for advocacy.

- **Customer 360**
- **Health Scoring**
- **Predictive Alerts**
- **Proactive Playbooks**
- **Workflow Management**
- **Team Performance**

AdStage Uses Natero to Understand Customer Behavior and Drive Customer Success

AdStage connects paid marketers to their ad data across paid search and social, web analytics, and conversion data to gain complete insight into the performance of ad campaigns.

“We help marketers unleash the power of data so they can make decisions that drive business growth,” says Kent Pearce, Head of Customer Success at AdStage.

These days, the CSM team has a good understanding of when customers need more attention, which customers are fully engaged, and how to spot valuable customer advocates.

But it wasn't always this way.

“Before Natero, we couldn't quickly tell which products our customers were using, or how much time they were spending in our platform. Thus, we didn't always know exactly where to focus our time.”

Kent knew the team couldn't rely on best guesses when it came to customer health. They needed easy access to customer engagement metrics, interactions, and important lifecycle events.

AdStage began to look for a tool that was built to meet the needs of a data-driven Customer Success team. They wanted something that allowed their CSMs to drive the inputs and outputs, and ultimately help them put their customers at the forefront of decisions across the company.

"At AdStage, we use a lot of different tools across our sales, marketing, and product teams. But we didn't have anything solely for our Customer Success team. Natero was that missing piece."

Using Natero, the Customer Success team can track how customers engage with AdStage's platform, including what features they use, where they spend their time, and many other KPIs. This helps the team quickly identify power users or re-engage slow adopters.

"Natero lets us understand when customers need a bit of coaxing, when they are using our product well, and when we should explore advocacy opportunities."

The AdStage team also uses Natero's alerts to help busy CSMs stay proactive. Natero automatically triggers notifications when an AdStage customer matches certain rules or conditions.

Some of AdStage's alerts focus on customer activity, changes in health score, or a combination of different metrics to identify potential advocates.

Corresponding alert playbooks provide next steps and best-practices that help CSMs take action while ensuring a consistent customer experience across the team.

"Natero helps us identify potential issues early, which lets us be more proactive."

Thanks to Natero's integrations, the CSM team stays in sync with customer interactions that take place across different apps and communication channels.

For example, Natero centralizes customer emails, as well as other interactions like Intercom chats, meeting notes, and Google Calendar events.

"Natero provides a central place for all of our conversations with our clients."

In addition, Natero helps AdStage manage, track, and analyze common workflows amongst the Customer Success team, such as new customer onboarding and renewals. Each workflow consists of multiple milestones with subtasks to help CSMs guide customers in a consistent, repeatable way.

Natero's workflows allow Kent and the team to nail down their processes and make more informed decisions about what's working – and what's not.

"In the past, I couldn't readily tell where we needed to tighten up our processes, change things up, or exactly how to coach the team through a particular situation. With Natero, that's become much easier."



About AdStage

AdStage is a closed-loop reporting and automation platform for paid marketers. AdStage connects marketers to their ad data across paid search, paid social, web analytics, and conversions to gain full insight into their campaign performance at scale. Paid marketers at leading agencies and companies such as MVMT, Purple, Hired, and Hanapin Marketing depend on AdStage's platform as their source of truth.

 www.adstage.io

 @adstage

About Natero

Natero helps Customer Success Managers reduce churn, increase expansion, and manage more accounts with less effort. Natero is the only Customer Success solution to combine predictive analytics, customer intelligence, and workflow management in a unified platform. This next generation solution helps B2B software providers prioritize, automate, and scale their Customer Success processes.

 www.natero.com

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