

PLAYBOOK

Intelligent Customer Success Operations

How to deliver insight, coaching and expertise to help your customers succeed.

“

Want to Elevate experiences. Scale Teams.
Be digital-first & automated. Let Intelligent
Automation blend human and digital touch points
to deliver real-time predictive insights to support
the customer journey - retention, adoption,
and expansion cycles.

PUT IT FORWARD, 2023.

Short on time - Read This:

- Customer Success Teams need help with onboarding, usage, renewals, expansion and loyalty. They are drowning under waves of customer data without powerful tools for real-time analysis and next-best action and often resorting to gut and customer motions that are half-baked, to say the least.
- Lack of resources, disparate systems, and easy-to-use powerful technology make it impossible to scale with the organization's growing needs.
- Intelligent Automation Platform offers an alternative to current challenges, manual processes and disconnected insights that are cost-effective, easy to use and deploy.
- **These playbooks and blueprints** provides real-life examples of how other organizations are leveraging the power of Intelligent Automation to improve their business.

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The Customer Success Landscape & Drivers

It's super compromised, blind and financially fractured



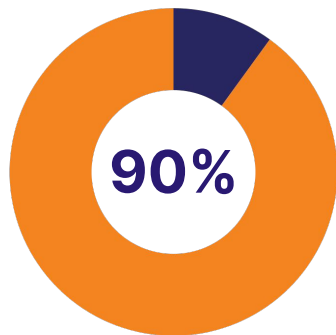
TRUSTED INSIGHTS

Customer Experience & Growth

Customer Success has evolved from a sales activity in its original days to a function, and now it's taken its rightful place as a philosophy. Customer Success teams need to be infused with insights to realize their true philosophy of delivering customer outcomes.

For the most part, customer success was given the largest revenue attainment pool with tools to drive strategic conversations on mobilizing and retaining this pool.

Many customer success teams need more analytics to tell them what is happening - insight and cannot determine the next best action. There is a widening gap in insight where onboarding, expansion and renewals are concerned with no one owning the customer outcomes. Intelligent Automation to boost customer success function.



OF COMPANIES REPORT THEIR CUSTOMER INSIGHTS NEED SIGNIFICANT IMPROVEMENT

While the average mid to enterprise size of organization has between 75-125 customer systems of engagement with more being added.

Source: Futurum Research and Microsoft

Current Challenges



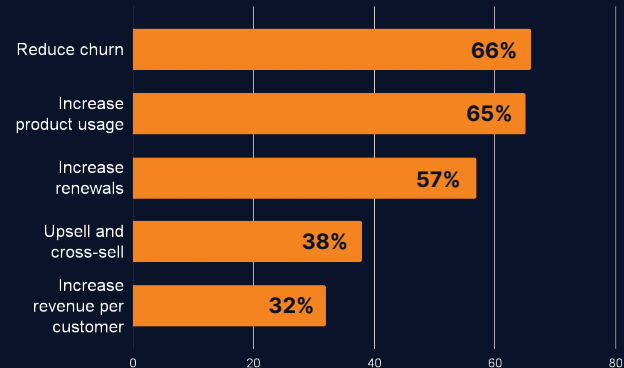
AUTOMATION = CREATE INSIGHTS

To become a top performing Customer Success Team you can't just integrate data - you have to surface deep customer insights to execute your next best action.

The challenge customer success has is automating and generating deep insight to spur action to run a more effective and efficient customer success program.

Faced with increased enterprise costs and tight budgets, customer success leaders find themselves between a rock and a hard place. To combat these challenges, customer success needs to look at the customer with three lenses: (i) how to deliver a better onboarding experience to drive product adoption, (ii) how to build an insights value chain for expansion discussions and (iii) how to extract real-time insights to prevent churn and improve renewal rates.

TOP 3 OBJECTIVES OF CUSTOMER SUCCESS PROGRAMS



Source: The Ultimate Guide to Customer Success

Challenge #1

Accelerating churn

With a 30% churn rate, organizations are destroying their customer lifetime value models and revenue expansion opportunities.

Organizations need better tools to analyze why customers churn, drivers of churn and which customers are most likely to churn in the future to combat the high cost of churn.

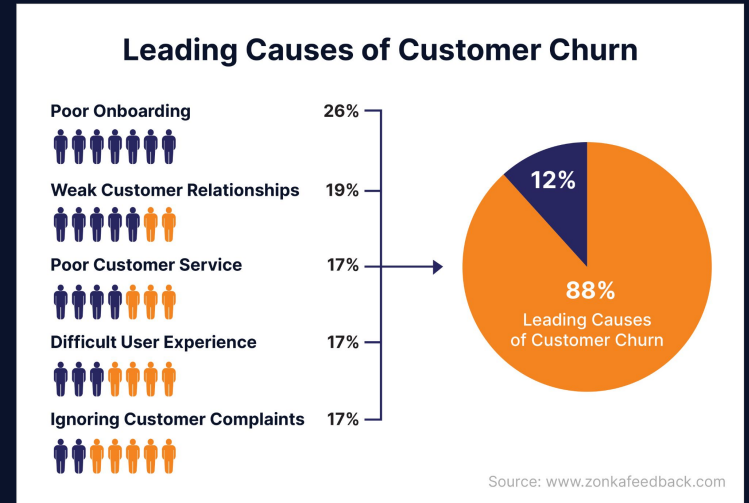
Organizations operating with disparate systems, siloed data, and hap-hazard customer processes typically fall into this category, and unfortunately, this number is growing exponentially.

In other cases, some organizations struggle with or have gaps in measuring customer value? Without proper segmentation, all customers receive the same service irrespective of the value they deliver to the organization.

Most organizations need a centralized or single customer view?

Fast-forward to a more progressive organization, the question becomes - are their data integrated? Are their intent signals, dashboards and reports early enough to allow their go-to-market teams to take appropriate action?

**1 in 3 customers churn annually
representing a 30% churn rate globally**



Segment	Monthly Customer Churn %	Annual Customer Churn %
SMB	3-7%	31%-58%
Mid-Market	1-2%	11%-22%
Enterprise	0.5-1%	6%-10%

Challenge #2

Declining customer renewals

Disparate systems and siloed data lead to analysis paralysis, slow decision making and lost customers at or before the renewal date. As the amount of disparate systems and siloed data in your organization grows exponentially, your team's time to analyze it does not. Increasing staff counts works up to a point.

The net new logo's 99.9% focus has started to show cracks in the customer base, which are showing up in the customer renewal metric, and a decline is happening.

With a vital need to reduce renewal decline, organizations' need for real-time insights is critical. Given the current macroeconomics and headwinds, achieving a high renewal rate is even more important than ever.

Gross Revenue Retention by Annual Contract Value



Source: State of SaaS Trends 2023

Challenge #3

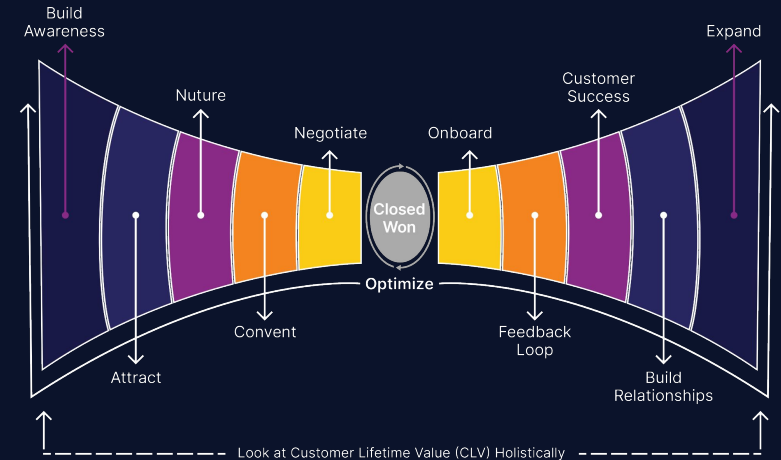
Land & Expand model requires on-going real-time analysis and intent signals for revenue expansion

Most organizations are feverishly aware of how they can provide their front-line staff with better insights to deliver a better buying experience. This insight does not only lend itself to net new logo acquisition. But it also extends to existing customers.

According to McKinsey, brands that get real-time customer personalization right can deliver five to eight times the ROI of their marketing spend and lift sales by 10% or more.

Data mining with predictive insights at the right step unlocks what actions the customer success manager should take next to improve product adoption, customer loyalty and, ultimately, expansion revenue. For companies that focus on the land and expand model, real-time insights are their best chance at winning.

The Land and Expand Model



Source: www.hunterandbard.com

Finding the Right Solution



Intelligent Automation creates real-time insights, delivers more value and unlock more growth opportunities.

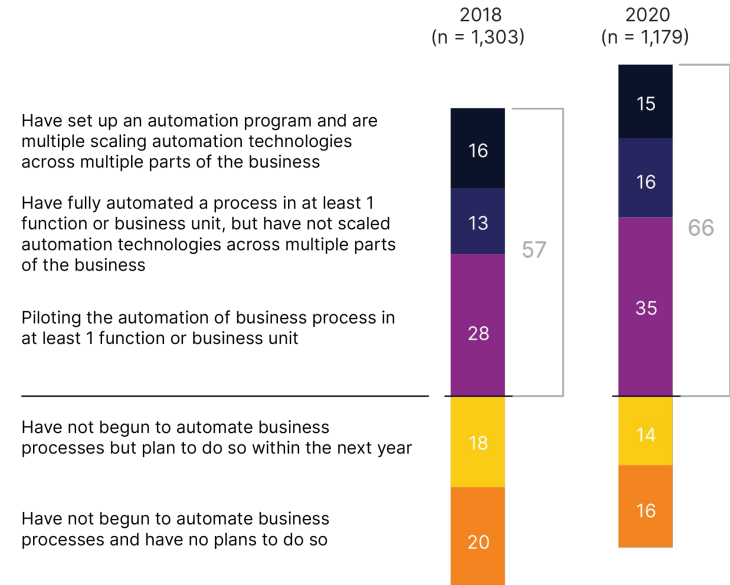
Insights for better decision-making require analytics to be part of how people work.

Intelligent Automation (IA) solves this barrier to high-quality decisions. It's a modern insights technology that combines predictive analytics, process and human-in-the-loop decision support.

The best part is this technology is designed for people to be easy to use, turning your employees into business movers.

The findings suggest that more organizations are pursuing automation now than two years ago.

Actions organizations have taken to automate business processes, % of respondents¹



¹Respondents who said "don't know" are not shown.

Source: McKinsey & Company

Challenges

Solved

#1 - Accelerating churn

Develop a comprehensive view of the customer with Intelligent Automation Platform and link that view directly to results. To become a leading Customer Success Team, you must link and aggregate disparate data sets to develop a full view of the customer over the entire journey—from onboarding to renewal to upgrade cycles and eventually expansion.

These data sets include customer profiles as well as product, offer, usage, and rebate history, and they include data from call centers, web logs, network experience, and pricing and promotions. The data is aggregated from legacy systems across the organization. With this aggregation, tracking customer engagements, pinpointing events creating customer friction and determining sentiment analysis to help Customer Success Teams devise the appropriate response is now possible.

Challenges

Solved

#2 - Declining customer renewals

Getting real-time insights of customer behavior, needs, and preferences helps to segment the audience by their readiness to renew. Regular value-added customer communication throughout the lifecycle is part of the customer adoption process. With Intelligent Automation Customer Success Teams can be presented with engagement data to determine how engaged a customer is and insights based on different customer touchpoints to determine if these were positive or negative and how to respond. Use cutting-edge analytical techniques with Intelligent Automation.

Predictive analytics powered by no code allows Customer Success Teams to apply advanced algorithms to vast troves of data. These algorithms can identify previously hidden variables and combinations of variables that predict customer behaviours, such as churn. Companies can then analyze the reasons behind those behaviours to develop solutions. Such a tailored approach requires a granular micro-segmentation of the customer base, which is matched to a broad, well-classified library of offers.

Challenges

Solved

#3 - Land and Expand

Intelligent Automation helps Customer Success Teams better understand customer behavior, and collaborate with marketing and sales to create personalized expansion campaigns based on customer interaction data across various digital interactions. Getting real-time customer insights allows Customer Success Teams to articulate for sales the right moment to connect and create an expansion conversation.

Break the customer base into scores of microsegments. The total value of data analytics can only be realized when companies can personalize the treatment of a precisely targeted group of customers with the highest propensity to purchase their next product or service, allowing GTM teams to realize the full potential of land and expand models.

Two Blueprints

For Revenue Creation and Data Science



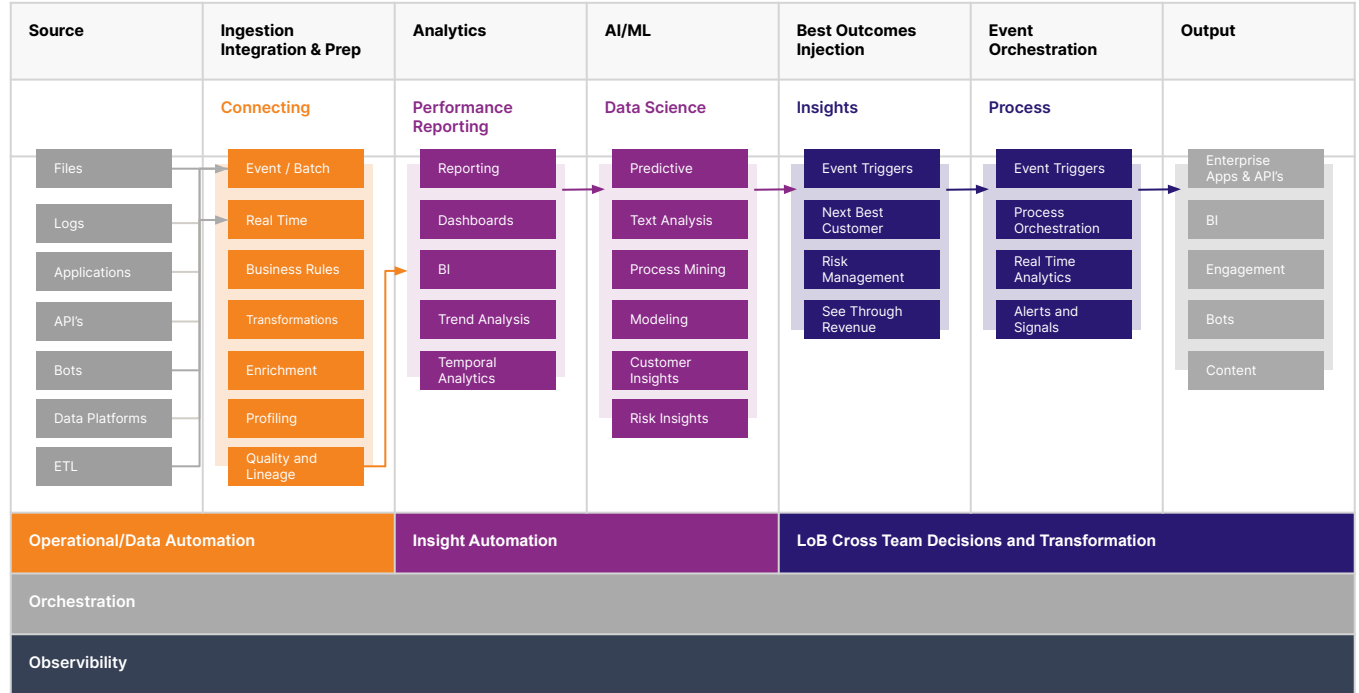
How it fits together

When things run smoothly people gain value when they can make effective decisions and operate effectively.

It starts with making the right data accessible and information available to the resources that need it most when the it's needed.

This platform view of how Put It Forward Intelligent Automation Platform fits into your data stack and how it works with solutions you have and processes that you need to improve.

In the following pages you'll see two common use cases solved by Put It Forward Intelligent Automation Platform that customer success teams are solved for.



Blueprint #1: OpenTable

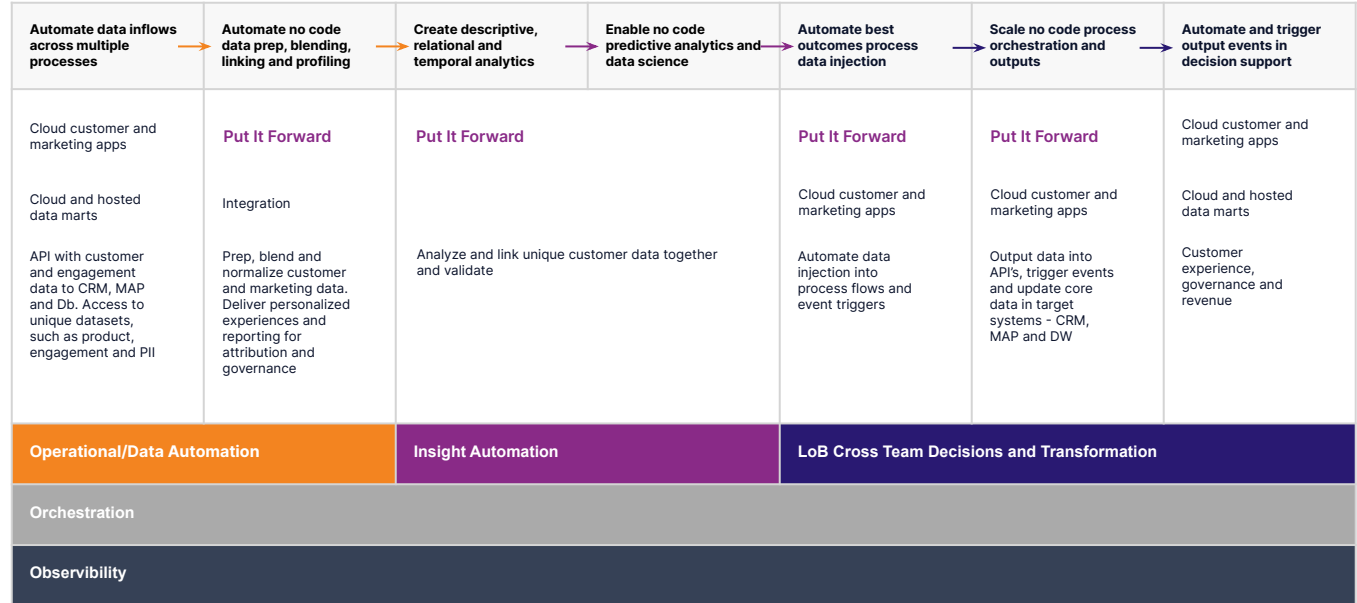
Process Automation and Data Insights for Customer Experience

Each year over a billion people choose their seat at a restaurant or bar by creating a booking through OpenTable. Owners and managers of experience destinations need to know exactly how things are performing.

Whether it's booking a table at your favorite restaurant, when you're travelling or you're an owner or manager of a restaurant it's success comes down to customer experience.

OpenTable who is a leader in the customer experience booking category needs to ensure that their customers, the owners and operators of customer experiences are themselves having the best possible experience.

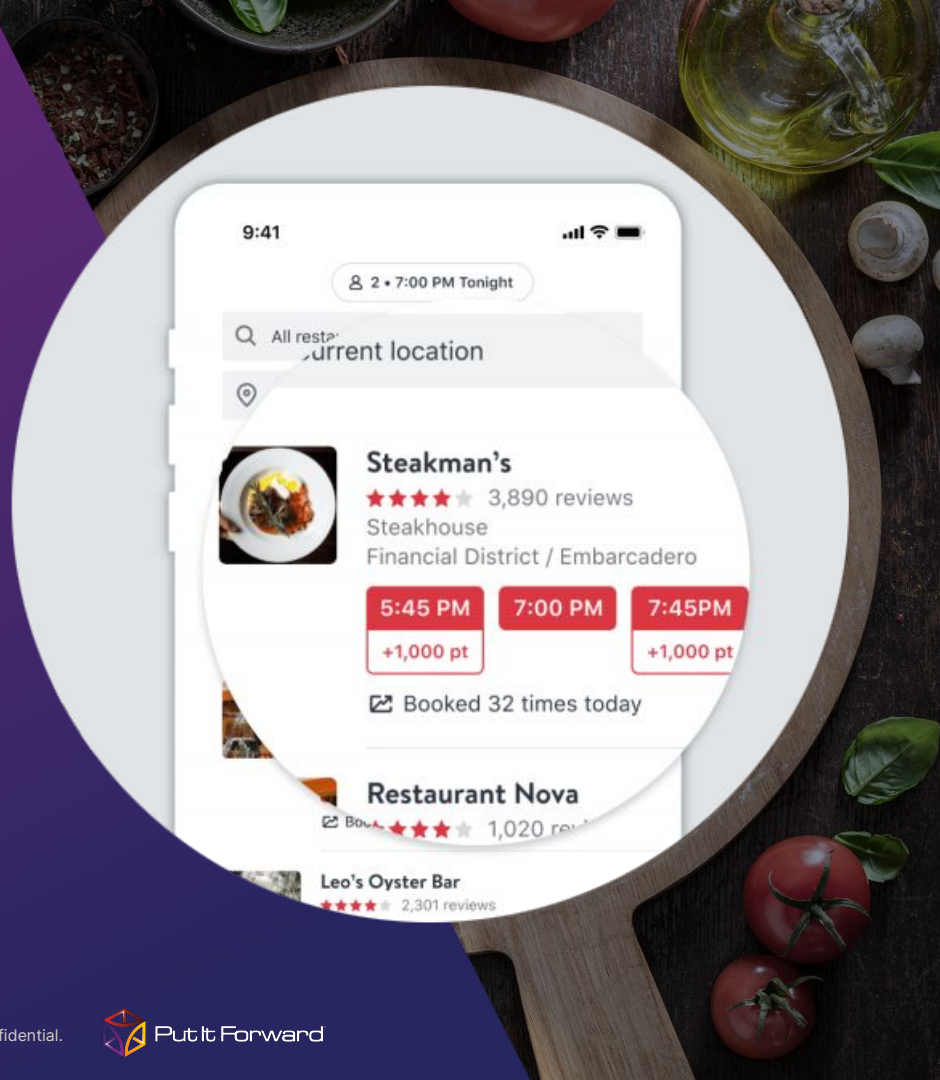
Using Put It Forward Intelligent Automation Platform they can now deliver highly personalized and targeted experiences to organizations looking to leverage the OpenTable Platform.



This blueprint represents a generic use case scenario for customer experience process automation and insights

• OpenTable®

- Deeply Personalized Experiences
- **80% Annual Cost Savings**
- Largest Global Booking Platform



Blueprint #2:

Revenue Creation Automation - Better Decisions at Scale and IoT

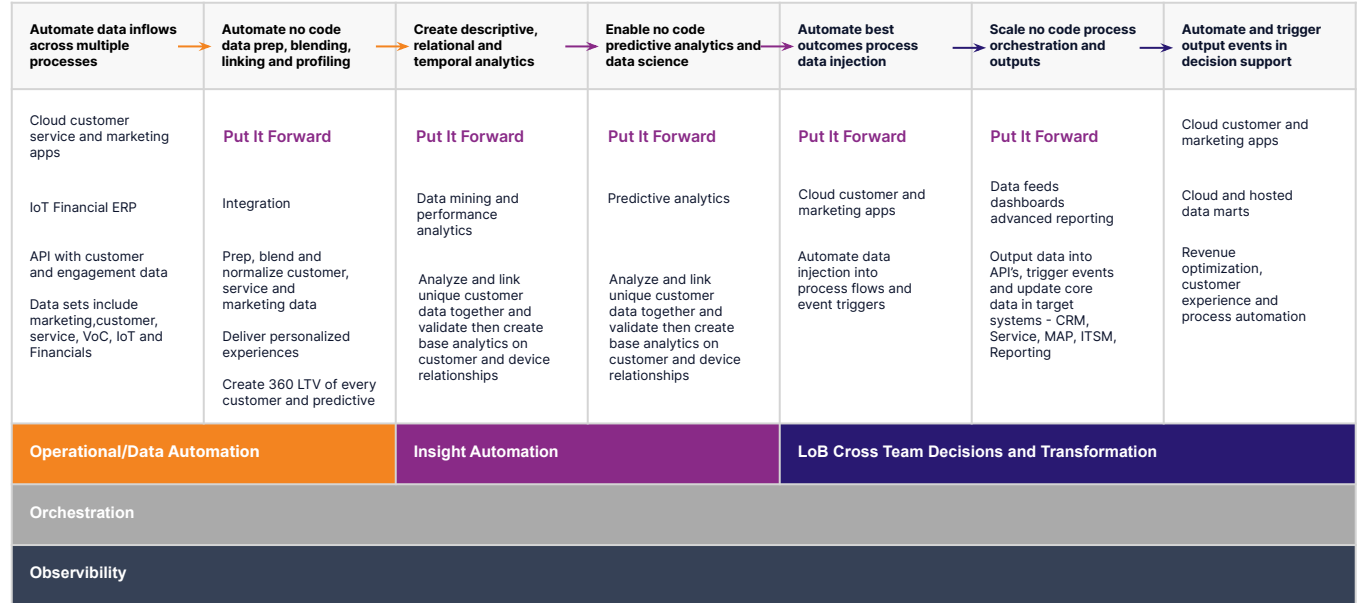
Some say that the sounds we hear and feel are the ultimate experience which connect us all together.

SoundUnited which creates some of the most iconic brands in the world of audio centered experiences has customers which engage across multiple brands and channels.

Using the Put It Forward Intelligent Automation Platform Sound United is able to unite the end to end customer experience across channels, devices and media.

They can now quickly market cross brand and channel with messages that resonate and understand at a detail level what each customer is doing along side of their lifetime value.

This let's Sound United be highly targeted with it's messaging, spend and marketing reducing cost, improving experience and leveraging the network of connected devices to a new level.



This blueprint represents a generic use case scenario for revenue automation



**SOUND
UNITED**

- Complete Customer Experience Automation
- Predictive Revenue
- **#1 Category Leader for Revenue Per Customer**

How People Use Put It Forward to

Solve Customer Success Challenges

Because your customer needs are always dynamic

Leaders in customer success need an automation strategy to maximize their data's value. They also need to shorten the time to better onboarding and product adoption.

The Put It Forward Intelligent Automation platform is the superior market offering to unlock your organization's true potential.

Put It Forward Intelligent Automation offers integrations between hundreds of your solutions, including Microsoft, Oracle, Adobe, SAP, Salesforce, etc.

Create insights at scale with an all-in-one comprehensive, scalable pay-as-you-go platform with an easy-to-use visual interface.

Hundreds of included integrations



But don't take our word for it alone.

Some of the best brands and organizations in the world rely on Put It Forward everyday for their mission critical decisions.

“

Put It Forward takes us where no others could - we struggled for years with an enterprise data story - this solved it across the board.”

Udo Waibel
Sitecore

“

“For me when our internal teams tried to replicate the Put It Forward technology that was when the pin dropped ... these are really smart people.”

Sarika Saoji
Symantec

“

“Having our global teams all working from the same page is critical to our success. Put It Forward exceeded way beyond where others died.”

David Hrynk
Brookfield

“

“You guys showed us what was possible by bringing all the pieces together and making it all work seamlessly. Really truly impressed, thank you.”

Lindsay Drake
OpenTable

Want to deepen your understanding of how you can use Put It Forward Intelligent Automation for Revenue, Operations and IT to scale better decision making?

Here's a look at some of the top use cases across the enterprise.

Revenue and Marketing

- ✓ Customer 360
- ✓ Predictive Insights
- ✓ Order to Close
- ✓ Fraud Detection
- ✓ Customer Experience

IT

- ✓ Cross Dept Automation
- ✓ RPA
- ✓ Platform Orchestration
- ✓ Integration
- ✓ Data and Process Mining

Operations and Finance

- ✓ Process Automation
- ✓ FP&A
- ✓ Order-to-Cash
- ✓ Procure-to-Pay
- ✓ Risk Analysis

Analytics

- ✓ End User Predictive
- ✓ Data Platform
- ✓ Performance Analytics
- ✓ Customer Insight
- ✓ LTV

As we move forward

It's less rip and replace....
but integrate, extend and
embrace.



Getting Started With Put It Forward

Automating processes and decisions while layering in predictive analytics can be complex. It doesn't have to be. When you use the Put It Forward Intelligent Automation Platform you're uniting the power of your data and systems with automation directly into the hands of your people so they can make better decisions at scale.

Ready to start?

Download the guide from IDC on Put It Forward predictive analytics solution for competitive advantage.

[Download IDC Guidebook](#)

Discover the value of intelligent automation in your organization with our interactive calculators.

[IA ROI Calculator](#)

Learn more about best practices for intelligent automation, methodologies and success patterns.

[Book a Discovery Discussion](#)

