Digital-First Customer Success: A Definitive Guide

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Introduction

Digital-first customer success has become imperative for companies in the wake of the disruption caused by COVID-19. The pandemic has accelerated an emerging shift to a new business paradigm which stresses digital transactions and the use of automation to help customers achieve their desired outcomes. Digital transformation is no longer something which companies aspire to, but a necessity many companies were forced to embrace virtually overnight. Digital technology provides the only way for companies experiencing high volumes and rapid surges of growth in online customers and operational activity to scale quickly enough to efficiently manage demand while still providing personalized service which meets individual customer needs.

Digital is here to stay. The digital shift has permanently changed the business landscape. Companies that are embracing the digital-first customer success revolution are enjoying benefits including improved customer experience, easier upsell opportunities and higher revenue. Those slow to start their digital-first customer success migration are falling behind the competition.

The path to a successful digital-first customer success strategy starts by mapping your customer journey so you can leverage digital processes and data to optimize your customers' experience. In this guide we'll show you how to do it.

We'll cover:

- What is digital-first customer success?

- Onboarding as an example of how digital-first customer success can improve your process

- Digital-first customer success vs. customer service vs. account management

- Why digital-first customer success is transformative

- Why should you adopt digital-first customer success?

- How to begin building a digital-first customer success approach: eight steps to automated customer success management

Read on to learn how adopting digital-first customer success can improve your customer outcomes, increase your revenue and give you a leg up on the competition.

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What Is Digital-first Customer Success?

Digital-first customer success is an approach to customer success management that prioritizes automated digital interactions and leverages digital processes and data in order to help customers achieve desired outcomes. To unpack this definition, we need to explain what we mean by customer success management.

Customer success management is a business strategy that promotes customer loyalty by ensuring that customers achieve the outcomes which led them to purchase your product or service. These goals can be defined in terms of increased revenue, greater efficiency, lowered costs or any other result desired by the customer. When customers achieve their desired outcomes as a result of their purchase from you, they are satisfied with your brand, making them more likely to become loyal repeat buyers and more likely to recommend your brand to others. Brands can increase customer awareness of success by explicitly discussing goals with customers and establishing measurable benchmarks that customers and providers mutually agree represent the achievement of desired outcomes.

Digital-first customer success brings the power of digital technology to bear on customer success management. It

uses digital customer data to track how well customers are achieving their goals and measure how satisfied they are with the outcomes they experience from their relationship with your brand. Not content to passively monitor customer outcomes, it uses this intelligence to actively optimize the customer experience. To optimize customer experience, digital-first customer success uses digital tools such as automated triggered workflows, communications and reminders. By combining these tools with digital data, digital-first customer success can guide customer experience towards outcomes that are mutually desirable both for the customer and for your brand. You can manage customer journeys at scale cost-efficiently while delivering hyper-personalized experience driven by data. This makes delivering optimized customer success outcomes more consistent, measurable and repeatable.

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ONBOARDING AS AN EXAMPLE:

How Digital-First Customer Success Can Improve Your Customer Success Management Process

To illustrate how digital-first customer success differs from other approaches to customer success management, let's consider the example of onboarding. We'll look at a conventional project-based approach to handling onboarding first. Then we'll compare that with a hybrid approach which incorporates some digital technology but isn't digital-first. Finally, we'll contrast both these approaches with a digital-first approach to onboarding.
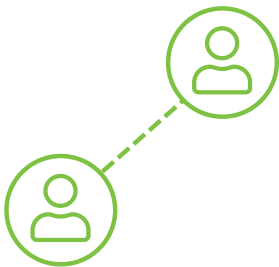
Conventional Project-Based Onboarding

Let's consider a conventional project-based approach to onboarding first. In this approach, onboarding is handled through a single, dedicated point of contact for each customer account. When customers encounter snags in the onboarding process, this requires the dedicated onboarding manager to do a lot of handholding, making this a very high-touch, time-consuming and expensive approach. This manual method of delivering customer success can be useful for some situations, but at scale, it can become difficult to manage.

Hybrid Onboarding

The hybrid approach makes greater use of technology than the project-based approach to onboarding, but it doesn't yet prioritize digital delivery of success support. Instead, it makes piecemeal use of digital technology, combining elements of digital support with the project-based model. For instance, after purchase, the customer might receive an auto-generated welcome email with a link to some support resources. Customers who need additional support can book their own meetings with their customer success manager. This approach incorporates technology into the onboarding process more than the project-based approach. However, it still operates within a framework where digital technology supplements manual support, rather than placing digital technology in the forefront of customer success management.

Digital-First: Automated Onboarding

Now let's contrast the project-based and hybrid approaches with a digital-first customer success approach to onboarding, as illustrated by Totango Spark's Digital Onboarding SuccessBLOC, specifically designed to automate the implementation of onboarding best practices. With digital-first customer success, the entire onboarding process is automated to the fullest extent, in a way which still allows graceful bailouts to people if needed to ensure successful implementation and deliver value.

Like the hybrid approach, digital-first customer success uses automated communication, but the usage is much smarter because it incorporates digital customer data. Messages are triggered based on data about where the customer is in the onboarding process. Messages may be sent not just after registration but based on subsequent customer activity or inactivity. For instance, if a customer has not completed set-up, onboarding or other milestones after a certain amount of time, an email may be sent to the customer reaching out proactively with support. An automatic alert may also be sent to a team member indicating that a customer needs assistance.

We've used onboarding to illustrate how digital-first customer success works, but the same strategy can be applied to any stage of the customer's interaction with your brand. Totango Spark supports digital-driven success outcomes for all stages of your customers' journey through SuccessBLOCs, modules which empower you to automate best practices for customer success outcomes and monitor your results through relevant KPIs and dashboards. Totango offers SuccessBLOCs to facilitate all types of customer success outcomes, including the conversion of SaaS freemium accounts to paid accounts, product feature adoption, subscription renewal, upsells and other steps in your customer's journey.

Within this automated success framework, when individual customer success support is required, digital-first customer success takes a flexible, one-to-many approach rather than one dependent on a single point of contact per account. For success teams with large-scale needs, Totango's platform includes dynamic assignment capability, allowing you to alert the appropriate personnel to assist a customer based on what the data reveals about the customer's needs. Depending on the situation, a customer success manager, software engineer or other relevant team members may be assigned to assist the onboarding process. This makes support customized and personal even though it is managed automatically. By relying on customer data, digital-first customer success can combine automated support with a human touch.

This engagement model is perfect for companies that deal at scale with B2C or B2B customers. You don't necessarily need to give each customer individual attention from human agents to build relationships. You can build relationships with your customer base through customized interactions based on data segmentation.

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Digital-First Customer Success *vs.* Customer Service *vs.* Account Management

To clarify the concept of digital-first customer success, it will be useful to distinguish it from some other concepts which are sometimes mistakenly interchanged with the concept of customer success management. Customer service and account management are sometimes discussed in the same breath as customer success and digital-first customer success, but these are really different things.

What Digital-First Customer Success *Is*

First, to throw the contrast between these concepts into stark relief, let's recap the concepts of customer success management and digital-first customer success. Customer success management focuses on promoting goals that customers and brands mutually agree represent desired outcomes. A digital-first customer success strategy defines such outcomes in digital terms and uses digital technology, data and processes to bring about desired results.

Digital-First Customer Success *Is Not* Customer Service

In contrast to digital-first customer success, customer service focuses on resolving support issues. While resolving support issues may help customers take a step in the direction of a successful outcome, in itself, support is not success management. A support issue is a barrier to the desired outcome, not a goal in its own right. Support can help remove a barrier to a customer's goal, but it does not establish what outcome the customer was pursuing in the first place. It does not employ digital strategies and tools to help customers achieve desired outcomes. It does not use digital technology to track customer progress toward desired outcomes. Providing support and promoting success through digital-first customer success are two different things. One does not eliminate the other, but digital-first customer success serves to enhance support.

Digital-First Customer Success *Is Not* Account Management

Digital-first customer success also stands in contrast to account management. Account management typically operates within a sales context and focuses on retaining clients and creating upsell opportunities. While digital-first customer success can help account management pursue these ends, it has a distinct mission. Digital-first customer success uses digital technology to bring customers to successful outcomes. When customers enjoy

successful outcomes, they are more likely to renew and more open to upsell offers. In this way, digital-first customer success creates the conditions necessary for account management to succeed. But digital-first customer success remains focused directly on client outcomes, and its benefits to account management are an indirect result of achieving those outcomes. Digital-first customer success has its own mission, which supports the mission of account management.

Account management and digital-first customer success also differ in another important way. Account management is typically pursued by account managers manually working with individual customers in one-on-one interactions. Digital-first customer success creates automated processes which operate at scale to promote successful outcomes for entire customer bases and data-defined customer segments. Digital-first customer success can focus on a granular level on individual customers, but when it does so, it uses digital data from that customer to generate automated responses appropriate to that customer. It can also determine when the data indicates a customer needs manual attention from an account manager. This is another way digital-first customer success remains distinct from account management, while still indirectly supporting the mission of account managers. Customer

success managers can even be cross-trained to handle common account management issues, providing customers with a low-friction experience where they feel that all the people working with them are well-equipped to help them. As with support, digital-first customer success does not eliminate account management but enhances it.

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Why Digital-First Customer Success Is Transformational

Digital-first customer success departs from approaches to customer success centered around project-based, high-touch human interactions. While it does not necessarily exclude this type of delivery of customer success outcomes, and can in fact enhance it, it gives human engagement a secondary role. Digital-first customer success prioritizes digital engagement.

This shift in emphasis has become necessary because digital technology has changed the nature of customer interactions. Consider the pain points SaaS customers experience during the onboarding process. A SaaS customer who can't log into their account or complete their profile is frustrated because they can't use the product they just paid for. Now let's say you have a thousand or a million customers with the same problem. Trying to address this manually on a case-by-case basis through individual success managers would overwhelm even the most efficient staff.

Digital technology requires an approach to customer success management that works at scale. Digital marketing methods allow you to acquire more customers more rapidly than you could reach through traditional marketing, but this can create a dilemma if you can't field the increased support volume. Digital-first customer success uses automation to increase your support efficiency so that

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you can serve customers at scale through automated tools such as knowledge bases, event-triggered notifications and chatbots.

This shift in emphasis to digital customer success management is disruptive. It gives companies that are providing customers a smooth digital experience a decisive edge over competitors who are failing to prioritize digital outcomes. For example, consider two companies that both have 10,000 customers who need help setting up their profiles. One company is using automated tools to guide these customers through common support issues. The other

is relying on manual support. Which company is going to resolve support issues faster? Which one is going to have more customers frustrated with long wait times? Which one is going to spend more time, labor and expense on support?

The COVID-19 pandemic has increased the importance of a digital-first approach to customer success management. Digital is no longer a dirty word, but a new normal. Customers who previously interacted with brands through non-digital channels are exclusively or primarily using digital channels. SaaS providers must think in terms of customer success management being digital-first and often digital-only.

For SaaS companies that seek to thrive under the new normal, digital-first customer success is essential. The SaaS market is expanding rapidly, and competitors can spring up overnight. Brands using digital-first customer success methods to optimize customer success can scale up quickly and overshadow the competition. To compete in this dynamic environment, you need a digital-first customer success strategy.

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Why Should You Adopt Digital-First Customer Success?

A digital-first customer success approach offers many benefits to companies that adopt this cutting-edge strategy. These benefits include:

→ Improved customer experience
→ Increased retention with reduced churn
→ Easy identification of cross-sell and upsell opportunities
→ Increased revenue
→ Reduced customer acquisition costs
→ Rapid-response adaptability
→ Scaling up customer success
→ Enhanced insights into data on customers and processes

Together these benefits give companies that prioritize digital-first customer success a competitive edge, making a compelling case for adoption.

Improved Customer Experience

The most direct benefit of digital-first customer success is improving customer experience at scale. A digital-first approach allows you to handle a high volume of customers while using data to deliver each customer a personalized experience suited to their exact needs. By promoting outcomes that align with customer goals and expectations, digital-first customer success nurtures customer satisfaction. A well-designed digital-first customer success strategy fosters desired outcomes at each stage in the customer journey, from onboarding and adoption through renewal and expansion, for all your customers, no matter how large your customer base.

Digital-first customer success can also remove obstacles to customer outcomes by flagging data patterns that indicate issues and triggering automated responses which direct customers back towards desirable results. In these ways, digital-first customer success promotes a smoother, more satisfying experience that matches clients' expectations and yields customer satisfaction. You can deliver satisfaction at scale.

Increased Retention with Reduced Churn

By improving the customer experience and boosting satisfaction, digital-first customer success promotes higher customer retention rates and lower churn rates. On the one hand, clients who experience successful outcomes are more likely to stick with your brand and renew subscriptions, becoming long-term loyal customers.

At the same time, increased retention means fewer customers are leaving, reducing your churn rate. Digital-first customer success allows you to identify issues that contribute to churn and automatically intervene to prevent it.

Moreover, digital-first customer success takes a data-driven approach that not only allows you to track retention and churn rates but uses these as a baseline for making adjustments and improvement. Digital-first customer success lets you maximize retention and minimize churn.

Easy Identification of Cross-Sell and Upsell Opportunities at Scale

Digital-first customer success not only allows you to retain the customers you have, but it can help you increase how much those customers are spending. By tracking which types of outcomes steer customers down a path toward cross-sells and upsells, you can identify ideal opportunities to extend follow-up sales offers.

Moreover, you can do this at scale. When you're growing and managing a high volume of new customers manually, it's hard to keep an eye on opportunities and engage for expansion. With a digital-first approach, you can use technology to monitor behavior patterns which indicate sales opportunities.

Digital-first customer success empowers you to capitalize on these opportunities by automatically activating sales best practices such as triggering personalized offers or alerting sales team members when a customer is a qualified cross-sell or upsell prospect. Implementing a digital-first customer success strategy can increase the quality of your cross-sell and upsell efforts, the number of your follow-up sales to loyal customers and the revenue generated by these sales. You can enjoy optimized upsells at scale.

Increased Revenue

By improving customer experience, increasing retention, reducing churn, and multiplying follow-up sales, digital-first customer success promotes higher revenue results. The more customers who renew their subscriptions, and the more customers who follow up their initial purchase by buying additional products and services, the more revenue you generate. Digital-first customer success increases your average customer lifetime value.

Furthermore, loyal customers who buy from you more than once are more likely to become your best brand ambassadors. This turns your customer's journey map into a self-perpetuating "flywheel", where one satisfied customer becomes a lead magnet attracting other customers. In this way, as one satisfied customer leads more customers to your brand, digital-first customer success can exponentially increase your revenue.

Reduced Customer Acquisition Costs

Besides directly increasing revenue, digital-first customer success increases your profit margin by reducing your expenses on several fronts. One of the most important ways it does this is by reducing your customer acquisition costs. Because you tend to retain more customers while losing fewer customers to churn, you don't have to expend as much revenue to replace churned customers with new ones. The money you invest in customer acquisition can go toward growing your business instead of offsetting the effects of churn.

Plus, each new customer you bring in is more likely to purchase more from you due to the effect of digital-first customer success on

increasing customer lifetime value. Digital-first customer success gives you more bang for your marketing buck. You can measure your return on investment by tracking KPIs such as customer acquisition cost (CAC) and return on advertising spend (ROAS).

Rapid-Response Adaptability

Another way digital-first customer success indirectly increases your profit margin is by giving you the agility to adapt more rapidly to changes based on your digital data. Powerful digital tools such as Internet of Things connectivity and machine learning provide you with real-time data and insights into unfolding trends. For example, rather than waiting until next quarter to see that your revenue has gone down because of customer churn, you can deploy the power of big data to spot early signs of churn, analyze why it's happening and take corrective measures before a problem escalates into a crisis.

Additionally, because digital-first customer success uses automated triggered workflows, you can implement adaptations rapidly at a large scale. Equally important, you can use split-testing to test how adaptations work on a small scale before rolling them out on a large scale. This ensures that your adaptations are not only rapid, but effective.

Scaling Up Customer Success

Another way digital-first customer success increases both revenue and efficiency is by making it easier to scale up customer success. By relying on automation and big data, digital-first customer

success gives you the capability to take optimized workflows which promote customer success and scale them up to whatever level you need. For example, instead of having your customer success agents manually work with individual customer accounts, a single agent can manage over 1,000 customers at once simply by triggering an automated workflow for the relevant segment of your customer base. This makes scaling easy.

Real-World Example

To illustrate this type of scalability in action, consider the case of Zoom. Even before the COVID-19 pandemic struck, Zoom was successful enough at its customer success scaling strategy that a single customer success person could manage 32,000 accounts. But pandemic-triggered lockdowns multiplied the need for videoconferencing exponentially, requiring Zoom to make rapid adjustments. By using Totango's digital-first customer success technology, Zoom was able to streamline an onboarding process that had previously taken three months so that it now took 16 days. This helped Zoom manage a boom in customer volume which could have been overwhelming without digital-first customer success technology, transforming an emergency into unprecedented growth.

Totango's customer success technology not only enables you to scale, but it provides you with a solution for workflow volume when you scale up. Without automation, scaling up could potentially overwhelm your team. With automation, technology can handle

repetitive tasks, reducing the workload on your team and freeing up team members to focus on activities which build customer relations and revenue.

Enhanced Insights into Data on Customers and Processes

The various revenue and efficiency benefits digital-first customer success delivers stem from its ability to provide enhanced business intelligence insights into your customer data and business processes. The challenge with handling customer data in a digital environment is the volume of customers and data and the non-linear behavior of customers. You can't create one workflow which works for everyone. You need to transform your workflow into an intelligent, autonomous system which finds patterns in your data and engages customers in relevant, personalized ways based on their individual data.

By allowing you to combine all the data you have on your customers into a single digital perspective, digital-first customer success affords you a true 360-degree view of your entire relationship with your customers. Totango's Customer 360 SuccessBLOC takes full advantage of this, combining multiple customer metrics into a single scorecard result which gives you a holistic view of your customers. At a glance, you can view the state of your client base, see where customers are in their journey, track engagement and evaluate how likely a customer is to renew or promote you to others.

You can get insights into not only your customers but also your business processes. You can use data insights to see which of your processes are working the way they're supposed to and where snags are preventing customers from achieving successful outcomes. You can then fine-tune your processes by making data-based adjustments and improvements.

By providing you with enhanced insights into your customers and processes, digital-first customer success empowers you to make quick decisions based on data. Instead of guessing whether a customer account needs attention or whether a standard operating procedure is doing what it's supposed to do, you can use objective data to track exactly what's going on in real-time and take appropriate actions to bring about desired results. Digital-first customer success turns business intelligence into successful outcomes.

Digital-first Customer Success Means Success for Your Brand

This long list of benefits illustrates the numerous advantages which stem from adopting a digital-first customer success strategy. Simply put, a digital-first strategy promotes successful outcomes for your brand as well as your customers.

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HOW TO BEGIN BUILDING A DIGITAL-FIRST CUSTOMER SUCCESS APPROACH:

Seven Steps to Automated Customer Success Management

How do you begin bringing the benefits of digital-first customer success to bear on your business model? The process of digital-first customer success adoption can be broken down into seven steps:

1. Map your customer journey
2. Provide insight into your customers' data to understand their goals
3. Set and track digital-first customer success goals
4. Design a scalable automated customer success process
5. Build an efficient customer success infrastructure
6. Consider a team support approach
7. Secure the right technology
8. Monitor and optimize your processes

Let's look at what's involved in each step of this process.

1 Map Your Customer Journey

Customer journey mapping forms a foundation for successful digital-first customer success implementation. A customer journey map lays out each stage in your customers' interaction with your brand, what needs to happen at each stage in order for customers to experience a successful outcome and what should be done to ensure successful results. A complete journey map can cover every step in the customer life cycle, including:

- Awareness
- Acquisition
- Conversion (from freemium to paying customer
- Onboarding
- Adoption
- Escalation
- Renewal
- Expansion
- Advocacy

The customer journey lies at the center of everything your business does when interacting and communicating with customers. It helps you anticipate your customers' needs and highlights where they may need help. It provides a framework you can use to create automated workflows to optimize the customer experience at each stage to ensure successful outcomes.

While a customer journey map can help you plan workflows, note that a customer journey map is not itself a workflow. A workflow is task-centric, while a journey map is customer-centric. A journey map provides a visual aid for understanding the stages in your customer's journey. You can insert automated workflows into this structure to promote the goal of each stage, but the structure itself is distinct from the workflows which can be built into it.

	Awareness	Consideration	Conversion	Onboarding	Adoption	Renewal	Expansion	Loyalty/Advocacy
Customer Activities	Google Search; Referral Websites (G2); Social Media/Youtube; Click on Search Results	Download eBook / Sign Up Newsletter; Read Blog Post / Sign Up for Webinar; Sign Up for Demo / Attend Event; Sign Up for Free Trial	Talk with Sales / Review Pricing Page; Invite Stakeholders to Free Trial; Interact with Chat / Negotiate Contract	Install Product; Set upl Product	Use Product; Invite users to team; Utilize additional functionality	Contract Expiration	Organic Growth – New Users/More Accts; Adds use cases or integrations; Requests additional support services	Writes Review on 3rd Party Site; Agrees to Case Study/Reference; Refers Colleagues / High NPS/CSAT; Guest on Webinar
Customer Touchpoints	Google Ad; 3rd Party Reviews; LinkedIn Posts; Youtube Videos	Website Landing Pages; Free Trial Sign Up; Email Campaigns: A, B, C, etc; Live Demo	Upgrade and Sales Emails; Pricing Page; Ecommerce Cart; 1:1 Meetings with Sales	Welcome Email; Progress Update Emails; In-App Set Up Experience; Kickoff Meeting; Failure Intervention Outreach; Onboarding Video Tutorials	Adoption email drip "Did you know?"; User progress email; CSM meetings	Renewal reminder emails; Escalation Management; Winback Campaign; Conduct QBR/EBR	Upsell/Cross Sell communication; User limits emails; Solicit referrals	1:1 with Marketing; CSM/AE emails; NPS/CSAT Emails
Customer Pain Points/Friction	Messaging not clear; Can't find what they're looking for	Unclear calls to action; Lack of Trust; Too much competition no differentiation	Hard to find help; Convincing stakeholders	Overwhelmed doesn't know what to do first	Lack of understanding of feature; Feature doesn't meet expectations	Lack of visibility on renewal date; Underutilization of the product; Too many support tickets	Stakeholders not on board; No access to all potential stakeholders; Lack of awareness of additional opp.	
Customer KPIs	Organic SEO; Paid Search; Social Media	Unique Visitors / Newsletter Subs; New vs Returning Visitors; Scroll Depth; Time on Page / Free Trial Subs	Sales Conversions/Sales Revenue by...; Product; Referring Source; Prequalifying Information	Onboarding Completion Rate; Average # of Days in Onboarding; # of Support Tickets During Onboarding	License Utilization; Customers Who Have Either Increased or Decreased Usage; Feature Adoption / Product Stickiness; CSAT After Adoption	Customer Health Score; Renewal Rate; On-time Renewal Rate; At-Risk Customers	Visits to pages providing tips on advanced features; Advanced Feature Adoption Rate; Support Tickets for Advanced Features; Cross-Sell & Upsell Purchases & Conversion	Customer Retention Rate; Customer Churn Rate; CSAT; Net Promoter Score (NPS)

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2 Provide Insight into Your Customers' Data to Understand Their Goals

Successfully implementing a customer journey map for digital-first customer success requires using data to provide insight into your customers' goals. Effective digital-first customer success takes a data-driven approach to customer goal achievement, using a digital-first perspective to analyze granular data about customer behaviors, promote automated engagements triggered by customer data and activate manual interventions if a digital approach needs human support. To deploy this digitally oriented approach to success management, you need to take a data-driven approach to define customer goals.

To implement a data-driven approach to customer goals, quantify goals in terms of key performance indicators which provide measurable targets and benchmarks. You can define KPIs for each stage of your customer's journey map. To illustrate some sample KPIs from different stages of the customer journey:

Onboarding: average onboarding time
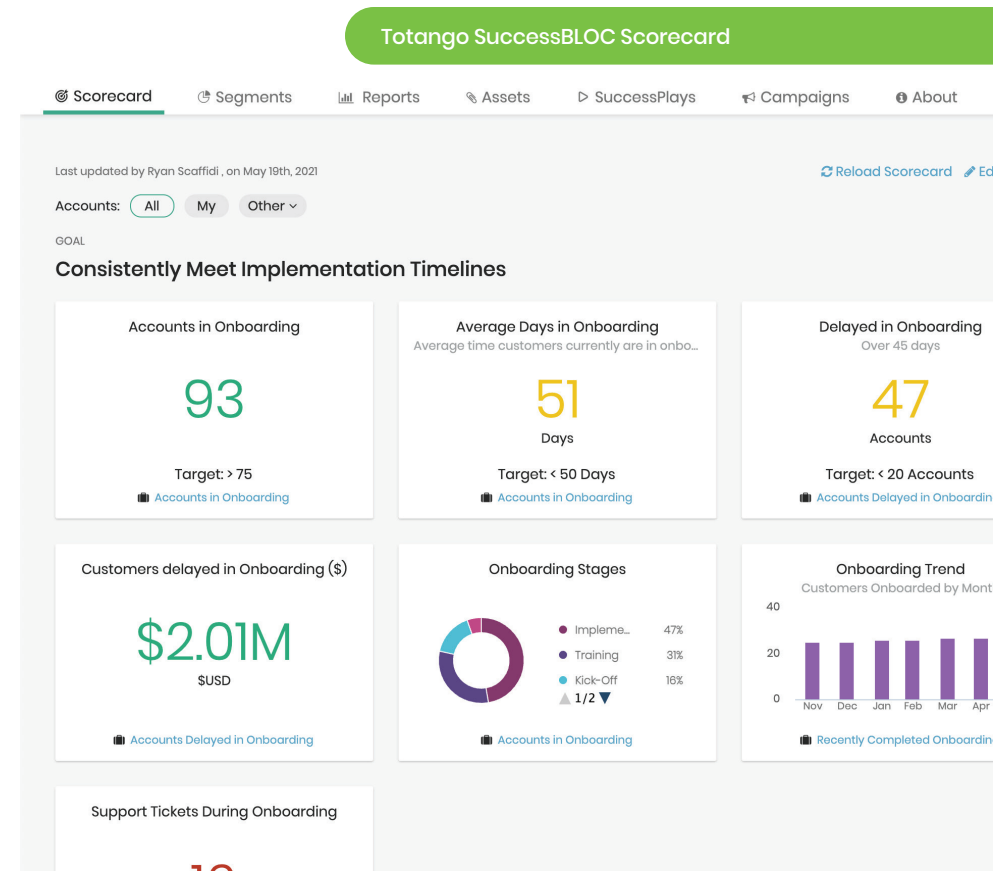**Adoption:** license utilization rate
Escalation: average first-contact resolution rate
Renewal: Net Promoter Score
Expansion: average customer lifetime value

For best results, you'll want to develop customized KPIs specific to your brand and the goals your customers seek in using your product or service. For example, if you sell a chatbot SaaS product, your customers might be interested in tracking how much use of your product shortens their average response time for delivering support.

It's also important to segment your customers into groups based on different types of goals and patterns of behavior that trigger automated engagement. Not all your customers will have the same goals and behavior patterns, and the more customers you acquire, the more diverse their desired outcomes and activities become. When you have large volumes of customers with different goals and different behavior patterns, this presents a challenge. Being able to segment your customers into groups with similar goals can help you manage this challenge by using a data-driven approach to deliver more customized and relevant automated responses to customer needs, precisely and efficiently with large volumes of customers.

Totango SuccessBLOC Scorecard

⊘ Scorecard   🕑 Segments   📊 Reports   🔖 Assets   ▷ SuccessPlays   📣 Campaigns   ❶ About

Last updated by Ryan Scaffidi , on May 19th, 2021   ⟳ Reload Scorecard   ✎ Ed

Accounts: (All) (My) (Other ⌄)

GOAL
Consistently Meet Implementation Timelines

Accounts in Onboarding	Average Days in Onboarding	Delayed in Onboarding
	Average time customers currently are in onbo...	Over 45 days
93	51	47
	Days	Accounts
Target: > 75	Target: < 50 Days	Target: < 20 Accounts
🏢 Accounts in Onboarding	🏢 Accounts in Onboarding	🏢 Accounts Delayed in Onboardin

Customers delayed in Onboarding ($)	Onboarding Stages	Onboarding Trend
		Customers Onboarded by Mont
$2.01M	Impleme... 47%	
$USD	Training 31%	
	Kick-Off 16%	
	△ 1/2 ▽	Nov Dec Jan Feb Mar Ap
🏢 Accounts Delayed in Onboarding	🏢 Accounts in Onboarding	🏢 Recently Completed Onboardin

Support Tickets During Onboarding

3 Set and Track Digital-First Customer Success Goals

Just as you can use digital-first customer success to track your customers' success at achieving their goals, you should also create and track goals for your digital-first customer success team in delivering customer success. For example, goals can include:

- Minimizing the volume of support requests by maximizing automation efficiency
- Improving onboarding rate
- Increasing license utilization
- Reducing response time
- Increasing average Net Promoter Score
- Set goals for your digital-first customer success team and measure your progress. Make changes to your digital-first customer success processes based on your data and individual feedback from your customers.

4 Design a Scalable Automated Customer Success Process

Defining KPIs which measure customer progress toward goals enables you to create automated processes that deliver successful customer outcomes at scale. When you're serving large volumes of digital customers, you can't afford to have them waiting in queues for an assigned person to assist them. You need autonomous systems which are automatically triggered by customer data, activating processes which help customers pursue their goals or remove barriers to customer goals. By handling the bulk of

customer success outcomes through automated processes, you can limit human intervention to a contingency invoked only when needed, enabling you to produce successful outcomes at scale for large numbers of customers.

You can create automated processes for actions such as:

- Sending customers Customer Satisfaction surveys after onboarding to measure customer sentiment at that point in their journey
- Sending automated renewal reminders as a customer's renewal date approaches
- Sending automated upsell offers to customers who have been using an advanced product feature frequently
- Automatically alerting human agents when customers experience certain types of support issues

Well-designed customer success processes should automate best practices for each stage of your customer journey. Totango's SuccessBLOCs facilitate this by providing out-of-the-box automated workflows, communications, KPIs, and reporting tools, plus the ability to create customized actions called SuccessPlays which are triggered based on criteria you choose.

Automating customer success relies heavily on providing customers with self-service tools. An up-to-date knowledge base which empowers your customer community to ask and answer questions is essential. Video tutorials can make it easier for your customers to digest information. Ask Me Anything sessions offer a hybrid support tool for customer success.

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5 Build an Efficient Customer Success Infrastructure

Delivering digital-first customer success depends on smart teamwork supported by a cross-company infrastructure. One advantage of a digital-first customer success approach to customer success is that because you rely heavily on automation, your team doesn't need to scale up in direct proportion to the size of your customer base. A small number of carefully selected team members can support a large number of customers, provided you use an efficient team management strategy. You can handle the majority of success support issues automatically and limit the deployment of human support to what is actually needed.

But to deliver successful outcomes to customers at a large scale, this type of streamlined customer success team needs to rely on the support provided by your company's wider infrastructure. Consider your customer's journey from their viewpoint. Whereas your company's internal organization is divided into different departments and teams, your customer's experience of your brand is a unified whole that cuts across their experience of your product, your website, your support, your billing process, and all other aspects of their engagement with you.

To deliver a satisfying experience, your customer success team needs to be able to share customer data throughout your organization and orchestrate engagement across different teams. Your technology needs to break down divisions between customer-facing data, teams, and communications so that your

customers experience successful outcomes no matter which part of your organization they're interacting with. Set up your automated success workflows so that they tap into whatever resources you need to deliver successful customer experiences.
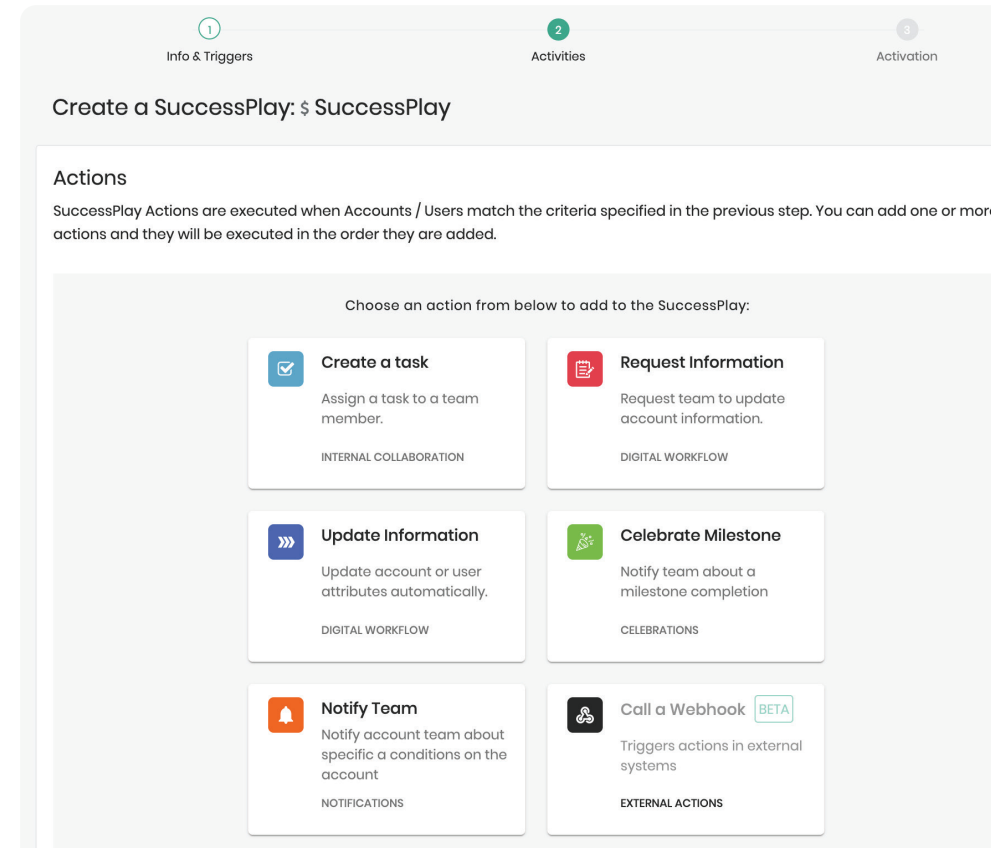
6 Consider a Pooled Resources Approach

As part and parcel of efficient team management, consider using a pooled resources approach instead of a singular point of contact for each customer account. This approach allows you to be more flexible about deploying team members as actually needed.
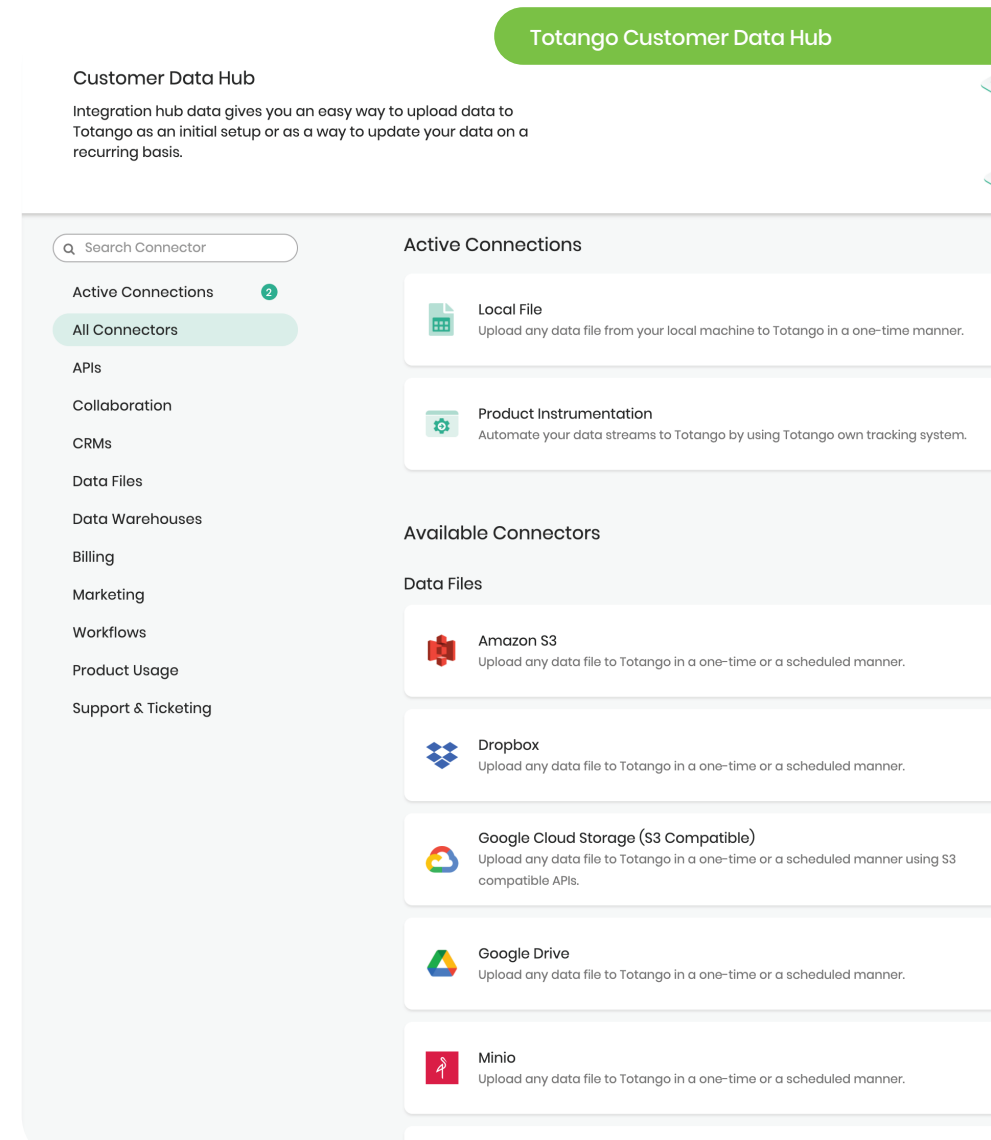
7 Secure the Right Technology

An effective digital-first customer success strategy depends on technology capable of supporting a digital-first approach. A digital-first customer success solution should include a number of key features:

- Automated email engagement triggered by data-defined events in your customer's journey, delivering an email-first path to customer success which only triggers human engagement as needed

- The ability to integrate data from all points in your customer journey map

- Ability to segment data to focus on particular customers, processes, time frames or other variables

- Options for organizing data in terms of key performance indicators

- Business intelligence tools for analyzing trends in your data

- The ability to trigger automated workflows and messages based on data

- User-friendly dashboards and reporting tools for viewing KPI data

Totango's Spark platform is designed to deliver all these features out-of-the-box so they can be deployed immediately. Spark's SuccessBLOCs come with built-in templates, workflows, KPIs and reporting tools corresponding to each stage in your customer's journey, plus the ability to add customizations. Our library of native integrations includes dozens of popular brands, platforms, and apps and is constantly growing, making it easy for you to get Totango to work with the software you're already using. Instead of having to invest in expensive business process development to get the functionality you need, you can just add the SuccessBLOC modules you need and configure Spark to do what you want. For example, our Onboard New Customers Digitally SuccessBLOC provides all the functionality of some of our competitors' entire platforms, and that's just one of our many SuccessBLOC modules.

Totango Customer Data Hub

Customer Data Hub

Integration hub data gives you an easy way to upload data to Totango as an initial setup or as a way to update your data on a recurring basis.

Search Connector

Active Connections   2
All Connectors
APIs
Collaboration
CRMs
Data Files
Data Warehouses
Billing
Marketing
Workflows
Product Usage
Support & Ticketing

Active Connections

Local File
Upload any data file from your local machine to Totango in a one-time manner.

Product Instrumentation
Automate your data streams to Totango by using Totango own tracking system.

Available Connectors

Data Files

Amazon S3
Upload any data file to Totango in a one-time or a scheduled manner.

Dropbox
Upload any data file to Totango in a one-time or a scheduled manner.

Google Cloud Storage (S3 Compatible)
Upload any data file to Totango in a one-time or a scheduled manner using S3 compatible APIs.

Google Drive
Upload any data file to Totango in a one-time or a scheduled manner.

Minio
Upload any data file to Totango in a one-time or a scheduled manner.

8 Monitor and Optimize Your Processes

Using digital-first customer success technology empowers you to monitor your customer success processes so that you can optimize them. By using your KPIs and automated dashboard and reporting tools, you can track how frequently your processes are delivering desired outcomes. You can identify high-performing processes which should be maintained and scaled up. At the same time, you can troubleshoot processes which are underperforming and test solutions. Likewise, you can split-test adjustments to successful processes to further tweak, improve and optimize them.

A key to optimizing customer success processes is implementing rapid learning cycles. Customers experiencing difficulties need quick, automated solutions if your digital-first success strategy is going to deliver desired results through technology instead of leaning on manual methods. To achieve this, monitor your customer support tickets closely to identify frequently asked questions and issues, and keep your knowledge base, resources and workflows updated to efficiently deliver automated solutions matching your customers' needs. Optimize your processes to provide successful outcomes which maximize customer satisfaction.

Monitor and Manage with Totango My Portfolio

My Portfolio

🔔 Notifications 124   ☑ Agenda 14   📌 Attention 6   🗀 My Folder

SuccessFlow +   Event Type +   Sort By: Date ⌄   ☑ Show my activity   🔍 Search for an account

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  ▼ The account's health declined to Poor Apr 03 2021, 12:59 AM

⌄ ● **Cloud Grid (Airbus - France Design)** ($58,961) PRODUCT **PREVIEW**
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⌄ ● **3M** ($13,718) CORPORATE **PREVIEW**
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08

Conclusion: Embrace Digital-first Customer Success to Propel Your Own Success

Digital-first customer success management reflects the need for companies to handle large volumes of digital customers at scale without diminishing the personalized quality of customer experience. Companies that are embracing digital-first customer success strategies are enjoying benefits ranging from improved customer experience to reduced churn and lowered customer acquisition costs, translating into higher revenue.

Implementing effective digital-first customer success adoption at scale requires a technology-oriented approach to customer engagement which leverages automated processes triggered by customer data to handle the majority of customer interactions automatically, reserving human support as a contingency for the limited number of bailout situations which truly require it. This empowers your customer support team to deliver successful outcomes to large volumes of customers by combining automated efficiency with data-driven personalization.

Statistics bear out the effectiveness of a digital-first approach to customer success. A Totango survey found that SaaS providers who have a digital customer success platform and systems in place which enables a ratio of 1:5000 or more between customer success managers and customers deliver a more proactive experience for their customers than those who don't. This demonstrates that an automated scaled experience can be just as personalized or even more so than a project-based approach.

The Totango Spark platform is specifically designed to put digital-first customer success into action, providing you with SuccessBLOCS you can use to optimize each stage of your customer journey for maximum retention and revenue. **See a live demo** of how Spark works and **try it free** to experience how digital-first customer success automation can transform the way you do business.

Yes, it's free forever.

Totango Community Edition gives you access to the same platform used by Zoom, Zeplin, WalkMe and more.

Get 3 full user licenses to take your customer engagements to the next level.

"Great workflow and process automation...dead easy to set-up."

Jan Petter R
Validated Reviewer, G2 Crowd