



YOU'RE NOT ALONE

79%

Of businesses state that AI will be critical to their success in 2024-2025.

64%

Of businesses see Al as a catalyst for productivity enhancement.

25%

Of companies are leveraging Al to address labor shortages, reshaping workforce dynamics.





IMAGINE THIS

YOUR CUSTOMER SUCCESS TEAM CAN ANTICIPATE NEEDS, AUTOMATE ROUTINE TASKS, AND **DELIVER** PERSONALIZED EXPERIENCES— ALL WHILE PREDICTING OUTCOMES WITH PRECISION.



PREDICTIVE

PRODUCTIVE

PERSONALIZED

PROACTIVE

PRESCRIPTIVE



PREDICTIVE

Using data, analytics, and AI to forecast future customer behaviors, needs, and outcomes.

PROACTIVE

Anticipating customer needs, challenges, or opportunities before they arise and taking action to address them.

PRODUCTIVE

Optimizing time,
resources, and
processes to maximize
the effectiveness
and efficiency of
customer interactions.

PRESCRIPTIVE

Providing customers
with clear, data-backed
recommendations on
what actions to take
next to maximize their
success with your
product or service.

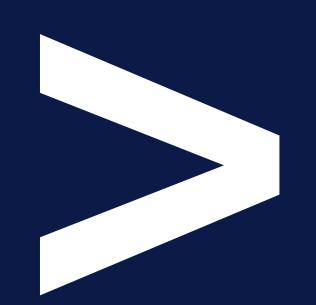
PERSONALIZED

Tailoring every
interaction,
communication, and
strategy to the specific
needs, goals, and
preferences of
each customer.



5 P'S OF AI IN CUSTOMER SUCCESS

DEMAND FOR A FUNCTIONALITY INNOVATION



PACE OF



PREDICTIVE USE CASE - Churn Prediction and Proactive Retention Strategy

ANALYZE CUSTOMER DATA

- Feed ChatGPT
 anonymized customer
 data such as
 engagement metrics,
 ticket history, usage
 patterns, and past
 churn data
- Identify common patterns of behaviors that indicate churn

CHURN RISK PREDICTION

- Ask ChatGPT to flag customers who display churn behaviors
- Categorize into different risk levels

PRESCRIPTIVE RETENTION ACTIONS

- Ask ChatGPT tosuggest personalizedretention strategies



PROACTIVE COMMUNICATION

- Use ChatCPT to draft proactive emails or create templates targeting at-risk customers
- Keep track of communication



PROACTIVE USE CASE - Proactive Customer Adoption Based on Usage Data

IDENTIFY POOR ADOPTION SITUATIONS

- Enter customer usage data into ChatGPT and find patterns of customers underutilizing the product
- Ask specificquestions about keyproduct areas

DRAFTING PROACTIVE EMAILS

Ask ChatGPT to help craft email templates with customer data
** Bonus points if you have customers goals documented and can include that



PROACTIVE EDUCATIONAL CONTENT

- Ask ChatGPT to help build FAQs, tutorials or a training outline to share with customers who are not adopting specific features



SETTING UP A PLAYBOOK

- Create these into playbooks that can be used in the future as new customers are identified



PRODUCTIVE USE CASE - Streamlining Customer Success Reporting

AUTOMATING REPORT GENERATION

- Enter customer usage data into ChatGPT and find patterns of customers underutilizing the product
- Ask specificquestions about keyproduct areas

CREATING REPORT SUMMARIES

Ask ChatGPT to help craft email templates with customer data
** Bonus points if you have customers goals documented and can include that



- Ask ChatGPT to compare the current report to the previous report and highlight changes

CHANGE

COMPARISON

- Call out customers that have improved or who are doing worse along with revenue impact

CREATE ACTION PLANS

- Use ChatGPT to help identify customers who have moved down
- Create an action
 plan to address the
 changes
- Track tasks in task management software





PRESCRIPTIVE USE CASE - Next-Best-Action Recommendations for Growth

ANALYZE CUSTOMER DATA

- Use customer usage data, feedback, and performance metrics, you can ask ChatGPT to analyze trends and identify areas where customers are underutilizing certain features.

OFFER PERSONALIZED RECOS

- Once you've identified areas of improvement, ask ChatGPT to generate tailored next-best-action recommendations for each customer.

CREATE PRESCRIPTIVE PLAYBOOKS

- Use ChatGPT to help create structured playbooks with step-by-step guidance for various customer scenarios.

CUSTOMER SUCCESS PLANS

- Use ChatGPT to help build prescriptive customer success plans that outline specific milestones, metrics, and recommended actions for different stages of the customer journey.







PERSONALIZED USE CASE - Tailored Engagement Based on Specific Needs

TAILORED CHECK-IN EMAILS

- ChatGPT can help you draft personalized check-in emails based on a customer's unique situation.

PERSONALIZED RENEWAL EMAIL

- You can use
ChatGPT to craft a
personalized renewal
email based on a
customer's journey
with your product.

CUSTOMER EDUCATIONAL EMAIL

- If a customer is struggling with a specific feature, you can ask ChatGPT to help create personalized training materials.

INDUSTRY SPECIFIC RECOS

- Use ChatGPT to tailor recommendations based on industry trends or benchmarks.



THINK DIFFERENTLY . . .

1.

Think about leveraging

Al as your assistant.

Task it with doing

the things you don't

want to do.

2.

Spend more time building out your prompts. The more specific the input, the more specific the output.

3.

Iterate. Iterate. Iterate.

The more you use AI to solve your problems
the more you will need evolve it to perfect it.



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