clientsuccess

CASE STUDY: plum|voice

Plum Voice improves communication with customers and decreases customer churn by 70% with ClientSuccess

Plum Voice was founded in 2000 to create technologies for personalized audio communication. Today, the New York City based company provides a Cloud IVR communications platform that provides interactive voice response platforms, systems and hosting services to streamline customer engagement.

The Challenge

The Plum Voice account managers had been using Salesforce for all of their customer success needs. However, because the Salesforce CRM was built as a sales tool, tasks were being missed when it came to customer needs. Additionally, there wasn't a regular cadence for reaching out to clients and no templates to follow when reaching out to different types of clients.

The CSM Team at Plum Voice needed help with:

- Creating a cadence of communication with customers
- Early risk mitigation/preventing customer churn
- Developing proactive outreach
- Centralizing data

"Our biggest challenge was trying to get into the regular cadence of communicating with the customer and building a relationship."

Reasons Went with ClientSuccess:

1. Full view of customer lifecycles with SuccessCycles
2. Better understanding of our customers with Customer Pulse Scores
3. Excellent customer service from everyone at ClientSuccess

1 – Lifecycle Management

“How we set up the life cycle of each customer differs based on the type of client they are. Whether they are a low touch account, maybe smaller accounts, or high touch accounts where we’re keeping on top of quarterly business reviews and checking and making sure that we have all of the correct contacts in place.

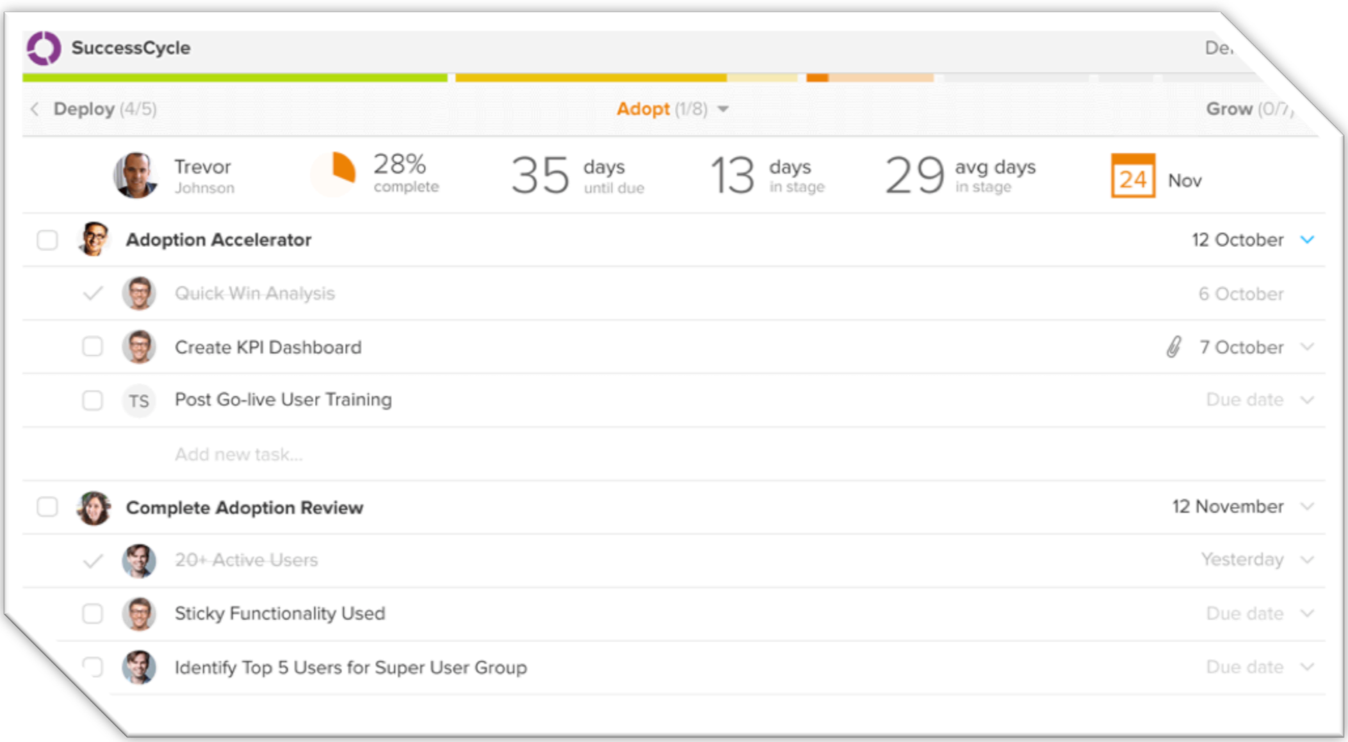
“Everything is set up to continue having conversations and make sure the relationship is improving and growing. The different documents and the different questions we have in place really help the account management team start those important conversations. For example, one of the questions we have in place is “what are your goals that are related to our solution?” Then, six weeks later “has everything been implemented across your team?” Then, again, six weeks later “is this improving your call flow?” “Are you using recording?” “Are you expanding into other areas?” “What metrics are you using internally to define success?” “Have any of the key contacts changed?” All of these different questions that we’re asking, that we’re driving, help us keep track of perspective, continue to grow our relationship and continue to grow the account. And, make sure that we are having relevant conversations to the actual account.

“Now I can easily look at an account and understand which life cycle they are in with us, how many years they have had service with us, which tasks have been completed, which questions have been asked, which meetings have happened, etc.”

2 – SuccessCycles

“The whole concept of SuccessCycles isn’t really a concept in Salesforce, so we were making that up as we went along with each account. There wasn’t any kind of template or anything we could go off of as it related to different types of clients. ClientSuccess, and the different SuccessCycles, have helped us grow the relationship and make our platform relevant to the user and their goals by continuing to speak about their specific needs throughout the process.

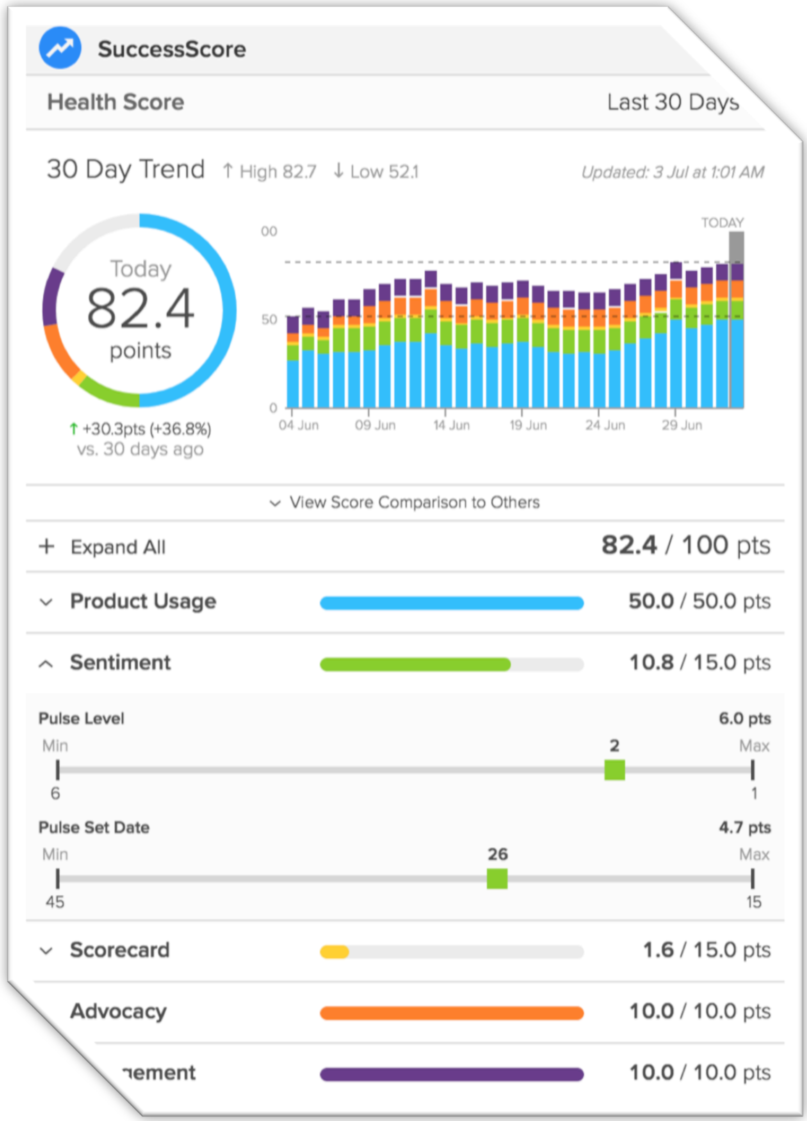
“Our main goals and KPIs are aligned with the company goals which is to expand accounts and prevent churn, as is typical for any company. We want to keep growing and don’t want people to leave. So, depending on the account size, we’ve built different touch points on ClientSuccess that we have with our customers throughout their SuccessCycle. This allows us, from the very beginning with an account, to speak to the customers about their goals and their KPIs as it comes to our platform. Then we continue to talk about those metrics, whether we’re successful in implementing those metrics, and talk about their short-term and long-term goals. Inevitably, we not only growing each relationship but we’re making the platform relevant to the user and their goals. And we continue to use that language and speak about their goals throughout the process and ClientSuccess, and the different SuccessCycles, help us do that.



3 - Customer Pulse

“We needed to better understand why some accounts grow and why others churn. Customer Pulse gave us insights to each account and gave us a tool where we could look and immediately recognize which customers need focus and where we need to build a relationship or repair a relationship. With ClientSuccess we can look at any account, at any given time, and understand what our relationship is like.

“We have also been able to put filters in place in our Customer Pulse to help us better understand the reasons we are marking a customer as low risk or high risk and track the data. Then, as a director, I can take that data to the executive team and tell them exactly why a customer is where they are and have all of the reasons. It’s given me a view into accounts I don’t touch every day.”



4 – Implementation and Results

“We sat down and planned out how we really wanted to use this tool,” said Nogol Tardugno, Director of Account Management at Plum Voice. “We came up with the different success cycles as it related to different types of accounts. We ran through scenarios with a few of our toughest clients to see how that went. Then, once we went through the success cycle, we got everyone together and had a meeting where we asked what things were important to everyone when it came to setting up something like the Pulse. We got feedback from the team and talked about the scorecard and what all that entailed. Then we worked directly with ClientSuccess to transfer all of the accounts and information from Salesforce into the ClientSuccess platform. From deployment, adoption took three to four months, but the actual migration only took about a week.

“We take full advantage of the different integrations ClientSuccess offers. We bring in their NPS score through Delighted to the different integrations ClientSuccess has in place. We are even able to bring in their usage data, which has been very valuable.

“Within my first year here we grew by about 20% and our churn went down by 70%”

“Our churn has actually gone down and we’ve definitely grown accounts. Within my first year here we grew by about 20% and our churn went down by about 70%. We’ve definitely improved our numbers from that perspective. And, in general, our communication to customers has become more personable and a lot better as it comes to the product and the platform itself. I actually base my reviews with our team on ClientSuccess with the Success Cycles and how much fall out is happening with each account. Since that’s all baked into the product, it encourages the team to use it and encourages them to stay in communication with their clients

We went from being very reactive with our clients to being very proactive as a result of having a lot more insight into our customers, the way they operate, their communication us and how they feel about the products. So, our approach has completely changed from reacting to the customer needs versus being proactive and that has built a relationship for our customers. And the feedback we get from our clients is that our account management team is amazing, they’re always reaching out, and they’re always in communication with them. And I think that’s a sticking point that helps.

5 – Why ClientSuccess

“I love ClientSuccess and tell all of my customers about it. It’s a great tool for any company that is providing services to another company. All of the data is now in a central place. All of the communications. All of the usage. I can go to a single tool and figure out their story. I can understand where they are, what their usage is like, what our relationship is like, the kinds of communication we’ve had as well as how much revenue has been made.

“If you currently have a customer success team, are struggling to be proactive, and have a good sense of where your customers are, from a relationship perspective, this is the perfect product. It gives you a great view into all of your customers and the details around, not only the relationship, but everything else as well. Our project management team uses ClientSuccess and even our billing team uses it. So, from the account management perspective, you have a full view of the customer lifecycle with you as a company, and ClientSuccess helps you become more proactive versus reactive when you’re growing these accounts.

“ClientSuccess has done a great job. The customer service has been wonderful, every time I’ve interacted with the technical team, it is so wonderful. Like us, you actually listen to your customers. There has even been features implemented just from conversations with our account manager and it’s exciting. And to see how much ClientSuccess how grown and what you’re doing with the different integrations and how you continue to develop the product, I think it’s great!”