

Skilljar Recaptures 65% Time Savings with ClientSuccess and Gains Complete Visibility into Customer Health at a Glance

Based in Seattle, Skilljar is a Learning Management System (LMS) that helps companies educate their customers and partners. Skilljar makes it easy to create training courses, distribute to web and mobile devices, and track results. Skilljar delivers scalable and effective training to customers, channel partners, contractors, and community members and helps accelerate product adoption, automate onboarding workflows, reduce support costs, and increase long-term customer satisfaction.

The Challenge

Skilljar needed a better way to keep track of their current customers at various stages of the lifecycle. They wanted to move from a reactive to a proactive customer success approach.

Molly Barber, Skilljar's Customer Success Leader, also needed a way to assess customer engagement. Specifically, she needed a way to measure not only customer engagement with

their company or team members, such as number of calls, emails, meetings, and overall touch points, but with the product itself, including how often the customer logs into Skilljar and how many training materials they create on the platform.

Molly was tasked with implementing a customer success management platform that would

efficiently track renewals, and upsells. She also needed a way to keep track and predict customer satisfaction and ensure all of their customers were successful - not just the most vocal.

Molly tracked this information manually via multiple disparate Excel spreadsheets that would take her 3+ hours each week to update. While Molly could keep track of what was happening with select, highly engaged customers, she found it difficult to keep track of all action items with customers at different stages. She found that valuable time was spent updating spreadsheets rather than engaging with Skilljar clients. The monetary impact of this manual

way of managing and tracking customer success impacted Skilljar in a few ways. First, it took 3+ hours a week (over 10 hours a month) to update spreadsheets, status, and pulse of customers. The manual processes made it difficult to scale their business and keep up with the momentum of sales. Second, if unengaged customers weren't using the Skilljar platform to its full potential, it was difficult to know it without reaching out. The goal was to move from a reactive to a proactive customer success approach that would provide visibility and insights into product usage, customer adoption, engagement, and satisfaction.

“With ClientSuccess, I feel incredibly organized and armed with the most important information at any time. In a moment’s notice, I can share customer information with my executive team and trust that the data and insights are completely accurate. I would recommend ClientSuccess to any customer success team looking to streamline their processes, spend more time being proactive with customers, and better protect against customer churn and overall unhappiness. ClientSuccess is the most important platform I use, and I can’t do my job effectively without it.”

—MOLLY BARBER, CUSTOMER SUCCESS LEADER, SKILLJAR

The Solution

Skilljar chose ClientSuccess as their customer success management solution to gain a holistic view of customer health. ClientSuccess also helps Skilljar implement a proactive approach to customer success that helps them increase product adoption, customer health, and satisfaction. ClientSuccess helps Skilljar decrease the amount of time it takes to understand customer health, which gives Molly and her team more time to work proactively on actions that drive business value to their clients.

Ease of use, intuitiveness, and simplicity of updating each customer account was another reason Skilljar chose ClientSuccess to scale their customer success department. The ClientSuccess Pulse™ feature allows Skilljar executives to gain instant visibility into activity and warning flags across all their customer accounts. The ability for future CSMs to use the platform from day one and be able to easily adopt their repeatable and standardized processes is another benefit Skilljar receives from using ClientSuccess. ClientSuccess also helps Skilljar recognize areas to improve in the customer journey, and visibility into individual and collective customer health scores.

The Results

ClientSuccess has significantly reduced time spent manually updating customer information. It now takes Molly 3-5 minutes to update each customer account where as in the past it would take 10-15 minutes each. She can now update all customers within an hour and a half, a time savings of 65%, which gives her much more time back to build relationships and take a proactive approach focused on onboarding and education for customers.

It's also now much easier to keep track of all customers - even those in the middle of the spectrum that aren't super happy or super unhappy. ClientSuccess gives Skilljar a dashboard into all customers in a single glance. They can set reminders and tasks that automatically keep them on track and can identify in less than a minute which customers may be at risk and which are coming up for renewal. This top-down view is critical for executives who want to know high level metrics of what's happening across the entire customer base.

Skilljar's time savings and ability to track the onboarding of new customers faster and more effectively equals more revenue. In addition to the monetary impact, the team spends time proactively helping their clients succeed. ClientSuccess has set up Skilljar to effectively scale.

ClientSuccess is customer success management software that helps companies build relationships that last. Revolutionizing the way SaaS companies manage, retain, and grow their existing customer base, ClientSuccess provides customer success leaders actionable insights, rich customer analytics, and best practices to proactively manage success throughout the customer lifecycle. ClientSuccess helps SaaS companies increase renewal and expansion revenue, reduce churn, and maximize the lifetime value of the customer. www.clientsuccess.com