Social Dental sees 2½ hour time savings per customer success team member per day with ClientSuccess

Social Dental is a Utah-based social media marketing solution for dental professionals. Social Dental is the only dental marketing company that offers a HIPAA compliant picture taking app, which has a built-in compliant legal release form that patients can sign after every photo.

With Social Dental, dental professionals can simply snap a picture with their patient, have them sign the phone with their finger, and the photo is ready to be posted on social media. Social Dental is committed to helping dental professionals engage better with patients.

The Challenge

Social Dental was founded in 2013 and has seen rapid growth in its customer base. With thousands of clients, the company saw potential to grow even faster, but first needed to re-think its customer success function. Social Dental re-organized customer success professionals into a 4-person team-based model to ensure success across all customers—from those that required high touch support to those that were more hands off. The goal of these teams was to focus on three primary objectives: Oversee the journey of customers, capture and report on the "Voice of the Customer," and give feedback to the Social Dental product team to improve the customer experience.

Social Dental was using a system to manage their customer contacts, however it didn't provide the customer success managers (CSMs) with a customer health indicator or any information on where the customer was at in their journey, which made it almost impossible for CSMs to identify where to start. In addition, the system was very inefficient and was not a productive use of time for CSMs—especially when managing their day-to-day tasks.

In order for Social Dental to be effective with their newly formed customer success teams, they needed to gain a holistic view of entire customer health. The team wanted to start with an overall health score and have a guide for how they should structure their day as it related to customers. Essentially, Social Dental wanted to help their customers—but they didn't know where to start and couldn't identify root causes of issues customers were having. They needed a solution that not only gave them insight into key customer information, but that also gave them real-time suggestions on where to spend their time and how to improve the customer relationship.

"With ClientSuccess, my team feels informed and empowered to make the right decisions because we always have the information we need at our fingertips. ClientSuccess is **not complicated** and the simplicity of the product makes it intuitive. I'd give ClientSuccess a 9 out of 10, knowing there is much more to come. The Social Dental team is excited to continue our partnership with ClientSuccess for the journey ahead, and we're excited to see how the platform continues to evolve."

—PAUL JONES, DIRECTOR OF CLIENT SUCCESS

The Solution

Social Dental selected ClientSuccess as their new customer success management solution. The team chose ClientSuccess for several factors, including: intuitiveness and ease of use, ability for new customer success managers to use the system from day one with a greater understanding of technology that supported their methodology, as well as how to recognize areas to improve in the customer journey, and visibility into the pulse of customer health scores.

ClientSuccess allowed Social Dental to break down the customer journey down into segments. It also helped the Social Dental customer success department improve onboarding with visibility into processes that were causing customer pain. Their customer success managers now have insights into a standardized health score and how the score is influenced by different stages in the customer journey: from onboarding to renewal and so on. The overall department increased productivity by working smarter, not harder, by using insights and information provided by ClientSuccess.

The Results

Social Dental saw major improvements across three specific areas. First, ClientSuccess helped Social Dental descrease the churn rate. Next, ClientSuccess helped Social Dental revamp their onboarding experience. The team was able to break down the process and turn each touch point into a different segment. The team realized that the onboarding process wasn't where they wanted it to be, and they were able to closely examine that part of the journey and engineer it to be better. Finally, the productivity of the team has skyrocketed, and so has the cost savings associated. **In fact, ClientSuccess is directly correlated with saving each customer success team member 2½ hours per day by focusing their actions on the right areas and by decreasing the time it takes to give an accurate update on customer status and health.**

According to Paul Jones, Director of Customer Success at Social Dental, "With ClientSuccess, my team feels informed and empowered to make the right decisions because we always have the information we need at our fingertips. ClientSuccess is NOT complicated and the simplicity of the product makes it intuitive. I'd give ClientSuccess a 9 out of 10, knowing there is much more to come. The Social Dental team is excited to continue our partnership with ClientSuccess for the journey ahead, and we're excited to see how the platform continues to evolve."