Consensus sees 20% lift in customer health with ClientSuccess

Consensus began in early 2013 with one mission: help their clients scale marketing and sales by intelligently automating the product demonstration. Consensus is Software as a Service (SaaS) company that automates custom product demos to accelerate sales. Their interactive demo platform personalizes video and documents so each prospect automatically learns about the solution they are being shown in the most relevant way.

The Challenge

The function of client success was introduced at Consensus in August of 2014—around the same time that Brian Zurcher, Director of Client Success, was hired to manage and grow all 75 accounts, which ranged from small businesses to Fortune 50 companies. Brian is responsible for everything that happens post sale, so when he first inherited his accounts, he had his hands full with implementations, trainings, hosting conferences, and educating clients.

When Brian first joined, everything had been previously run through rudimentary spreadsheets where there was very little information on the overall client base and processes and almost zero information on each individual client. So, according to Brian, "there really wasn't a client success setup at Consensus".

While doing his best to manage so many clients on his own, Brian was constantly challenged by having to juggle numerous projects and tasks, many of which were falling through the cracks. Clients would ask Brian questions and he didn't have a reference because he wasn't there when the client first came onboard. "There were no notes, so when clients would bring up things from the past, it was 100% manual and took forever to gather the information. There was lot of frustration from both parties."

The overall lack of organization was a major driving factor in searching for a platform to help solve some of the issues Consensus was experiencing in managing their clients. In addition, they struggled to track how clients were progressing (or not progressing) through the lifecycle, their next milestones, and the goals they wanted to accomplish by using the Consensus solution. Consensus wanted a way to proactively manage clients throughout the entire lifecycle based on best practice customer success methodologies.

The Solution

Brian and the team at Consensus researched solutions to help them manage client relationships more effectively, and selected ClientSuccess as their partner in August of 2014.

For each new Consensus client that comes onboard, Brian sets up a kickoff planning meeting to better assess the client's needs and to gather more information about their goals for their use of Consensus. Brian then uses the ClientSuccess platform to record those goals and determines which "SuccessCycle" (which allows users to define, manage and measure methodology for driving success throughout the lifecycle) to assign to that particular client. Within these SuccessCycles, which Brian configured specific to Consensus, he now sees due dates for specific projects or implementation needs, and also tracks what activities he needs to be doing to make sure all clients are on the right path.

The team at Consensus also uses ClientSuccess to reference how their content team is progressing in making the demos for clients. Brian explained, "Right now we use it to reference whether there is new demo being created for a client, as well as timelines associated so the demo content is delivered on time."

Brian also leverages ClientSuccess to manage the unique renewal process for each client. He tracks these renewals along with how engaged his points of contact are and is then able to start the process with the client accordingly. Approximately 90 days out from renewal, he begins a drip process of engagement, which allows him to be much more proactive.

The Results

In less than five months, the overall knowledge base of clients at Consensus has increased dramatically in terms of understanding where each client is within their defined lifecycle and knowing whether each client is on track for success. Brian commented that, "I'm no longer juggling 75 balls waiting for one to slip. I, along with my executive team, have a lot more comfort in understanding where clients are within the lifecycle."

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Now, with each client, Consensus has identified a primary metric to follow. "In each of the conversations we have, we're tracking those goals. Within ClientSuccess, we highlight what the goal is and we track against that – we review them with the client in every conversation so we're always focused on a specific goal and what changes have been made to reach that goal," said Brian.

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Brian and his team can also take pulse of each client and have the ability gauge all clients in a single view to see who may be at risk and when the last activity date was. This way, Consensus can easily identify "emergency clients" that they need to track closely as well as understand which clients are having good success. This quick pulse has been invaluable for Brian and his team to quickly see how the client base is doing – and has also proven very valuable to the executive team's reporting needs.

According to Brian, "In terms of tracking clients and understanding them better, the overall 'pulse' of clients (a personal perspective on customer health) has increased dramatically since using ClientSuccess simply because of the ability to track and follow SuccessCycles. It's allowed me to be more proactive and has driven the overall client pulse up to a 20% improvement from where average client pulse was before we first started using ClientSuccess. In the past, we were virtually blindfolded going into client calls – now with ClientSuccess, I'm able to do a lot more consulting and it's much more collaborative."

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The Vision

Brian and the team at Consensus have a great vision for how they will continually improve their client success function including expanding the team and utilizing technology to a greater extent. One of the immediate goals Brian has is to take more advantage of due date notifications within ClientSuccess. Now with added ability to create unqiue steps and due dates within each client account, the team can be more focused and make sure they are properly customizing to each client. Brian commented that, "We can create a very individualized SuccessCycle based on our clients' needs. We can take a shell and really customize it in a powerful way."