

# ***Beyond Proactive: Anticipating Customer Needs***



**Kristen Hayer**

*Founder & CEO  
The Success League*

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**The intelligence you need to scale customer success.**



## **CS100 2018**

Beyond Proactive: Anticipating Customer Needs  
Kristen Hayer, CEO





**MSP Platform Solution  
New York, NY**

**Growth Stage Company  
Highly Competitive Space  
3000+ Global Customers  
Average ARR = \$2000**

**Low-Touch Approach  
Heavy Automation  
Customer Success is a Differentiator**

# Anticipating the WHAT

Delta knew that I am a frequent business traveler and would need a new flight with a similar arrival time.

Our SaaS customer had clients who were churning early, within the first month or two. Their automated onboarding wasn't working. Clients needed better information on how to get started.

- Reviewed early client churn reasons + conducted interviews
- Determined 7 key product areas that weren't being effectively addressed at the onboarding stage

**TIP: Focus on the areas where you can make the biggest difference first**

# Anticipating the WHEN

Delta knew that because my new flight was within two hours, I'd need to get through security quickly.

Our SaaS customer knew that each of their new clients needed to go through a change management process as they got their new platform set up. This would typically occur over the first month.

- Reviewed support requests from clients in their first month and looked at when they asked for help with specific topics
- Created an automated communication plan that fed information to clients just before they were likely to need it.

**TIP: Try to get clients what they need, just before they need it**

# Anticipating the HOW

Delta knew that after the stress of being re-routed and needing to get to the airport early, an upgrade would be very welcome.

Our SaaS customer knew different pieces of onboarding content were performing better than others. Their clients weren't all getting the same information, and some were missing out on important messages.

- Inventoried the current onboarding content.
- Selected a delivery method that best matched each piece of content
- Applied best practices to each delivery method

**TIP: Different messages are best conveyed using different methods**





**33% Reduction in Churn**  
**50% Reduction in Early Churn**

**1-2 Week Faster Adoption of Key Features**

**Positive Feedback from Customers**





# Q & A

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**Customer Success Consulting Services**

**CSM Training Program** – classes and workshops

**CS Leadership Program** – classes and coaching

**Customer Success Performance Index™**

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