

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

**LEVERAGING PRODUCT
USAGE AND ADOPTION
DATA TO INFORM YOUR
CUSTOMER LIFECYCLE
ENGAGEMENT AND
OUTREACH**

TUESDAY, JULY 26, 2022
1PM EST/ 10AM PST



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Chief Customer Officer
ClientSuccess

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IF YOUR CUSTOMERS
AREN'T USING YOUR
SOLUTION THEY AREN'T
GETTING VALUE FROM
THE PARTNERSHIP.

USAGE

#of Users

Daily Logins

% of Active Users

License Activation

Usage Trends (7-day)

Logins by Role Type

ADOPTION

Feature Adoption

Feature Usage

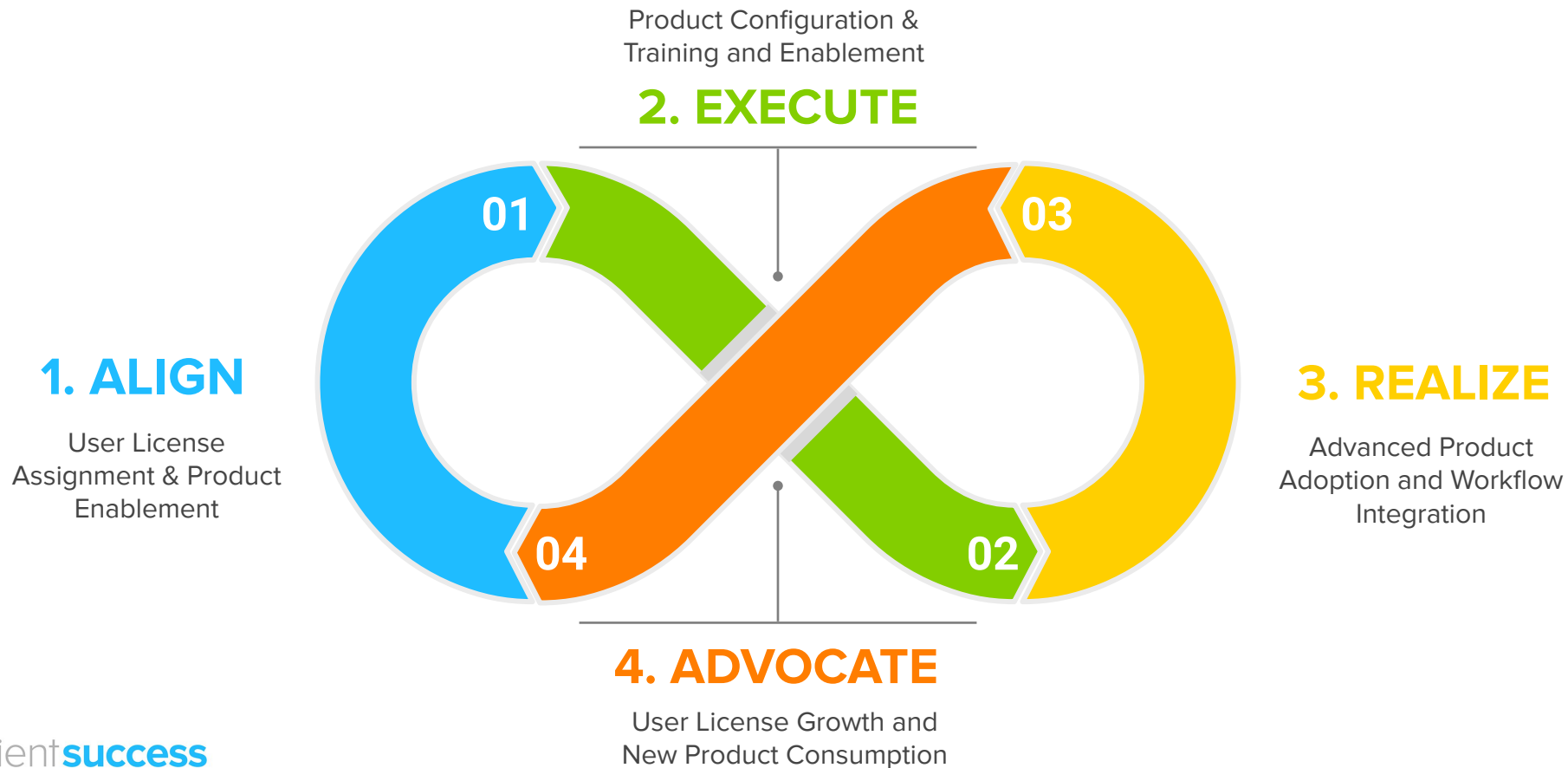
Sticky-ness

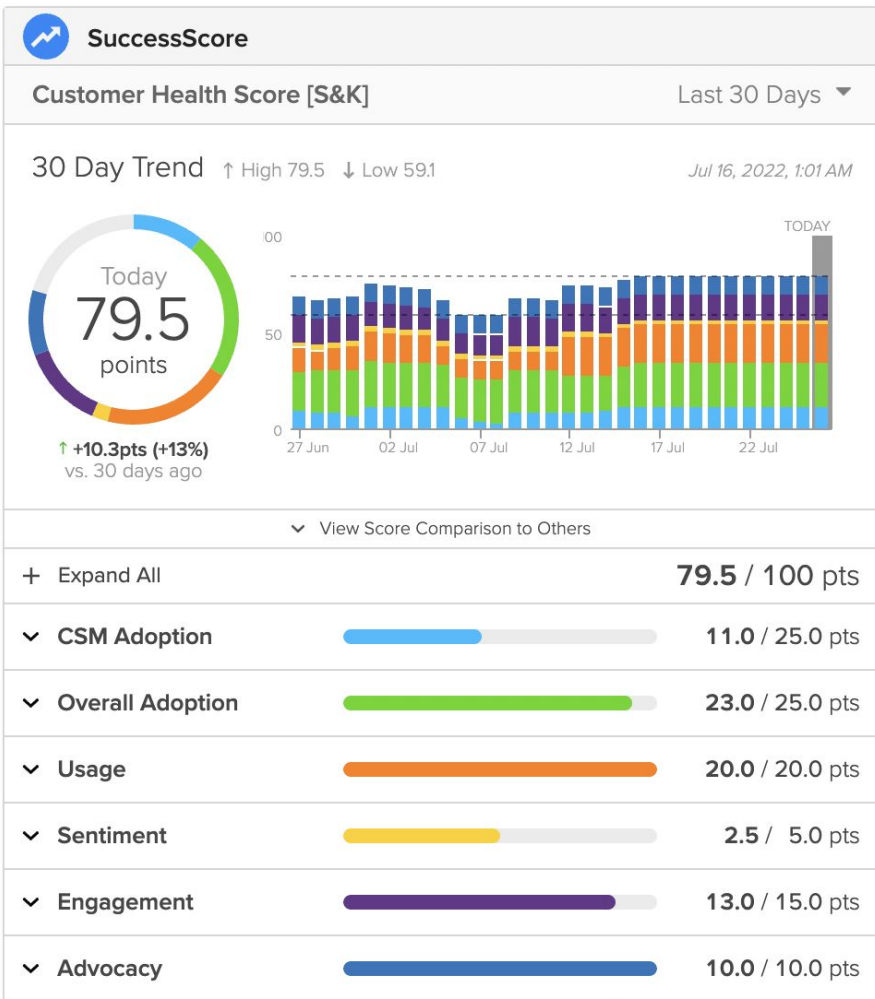
% of Features

Purchased

% of Features Used

ADOPTION & USAGE IN THE LIFECYCLE





CUSTOMER HEALTH DESIGN

- Include usage and adoption data into your Customer Health Score
- Design with the right metrics and weighting
- Customer Health is not universal - Consider your customers by segment, usage case etc.
- Understand trends as it relates to your product
- Monitor over time to identify what “good” looks like

UNDERSTANDING PRODUCT ADOPTION



**HOW STICKY IS
YOUR PRODUCT TO
NEW USERS**



**HOW DOES THE SPEED
OF ADOPTION IMPACT
RETENTION**



**WHICH BEHAVIORS
CORRELATE WITH
ENGAGEMENT AND
RETENTION**



**HOW OFTEN AND HOW
MUCH ARE USERS
SPENDING TIME IN
YOUR PRODUCT**



**WHICH PRE-ADOPTION
BEHAVIORS BEST
PREDICT ADOPTION**



**DO USERS CONTINUE
TO ADD ON OR USE
NEW PRODUCT
FEATURES OVERTIME**

LIFECYCLE ADOPTION AND USAGE MILESTONES

ONBOARDING

Once the product is configured based on the customer needs it's critical to train and enable the team.

ADOPTION

Ensure that the end users of your solution understand how to integrate the product into their workflow.

GROWTH

Map a plan for adding new users and making sure there is a way to get them onboarded trained and enabled.

SUPPORT

Ensure that your support team always has the product knowledge needed to make them effective.

LIFECYCLE ADOPTION AND USAGE MILESTONES

TURNOVER

Employees will leave - depending on their role this might change the strategy of how tools are used and adopted.

POOR ADOPTION

Intervene when there are signs that the product is not being used as initially intended. Watch for warning signs in data.

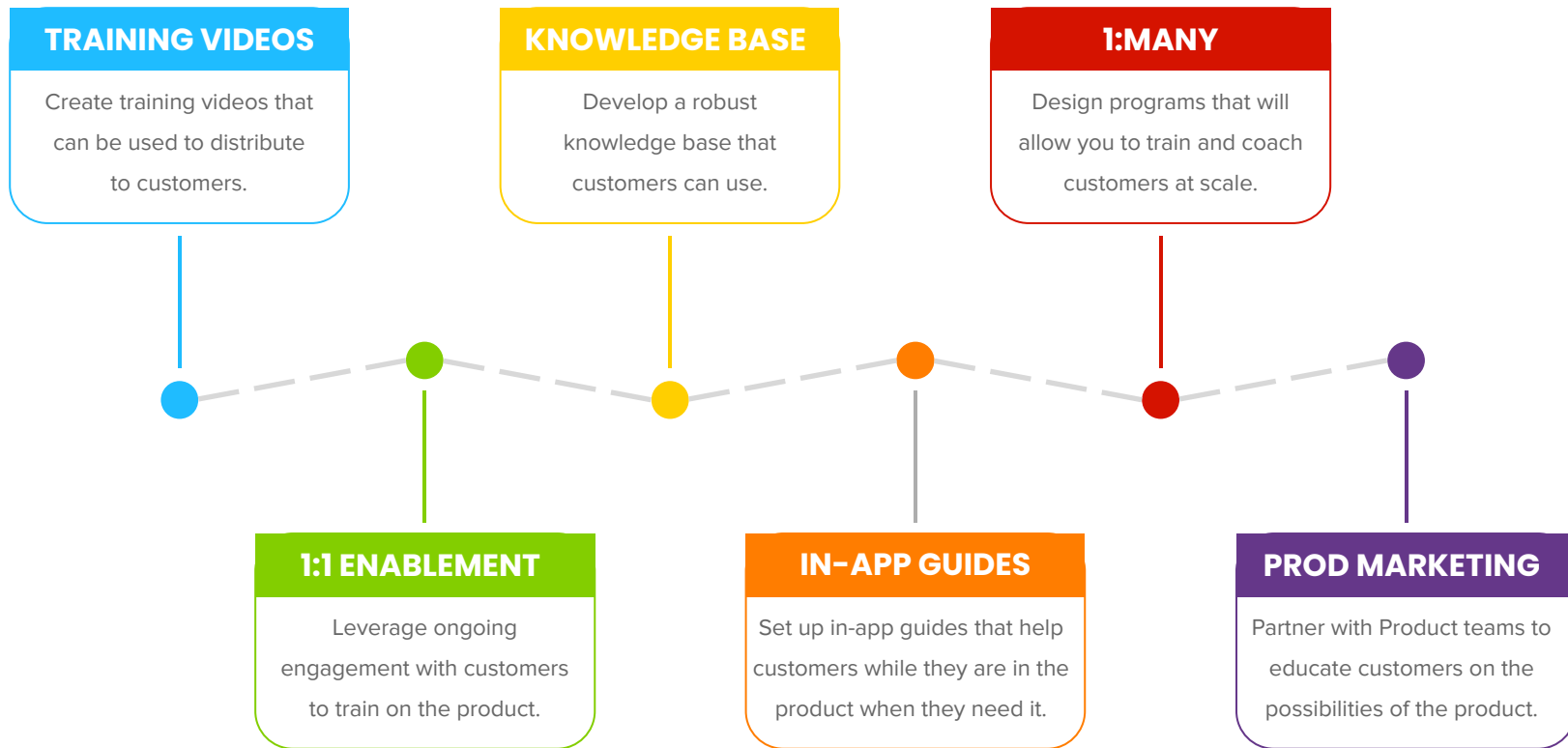
PRODUCT NEEDS

Stay aligned to your customers needs and make sure to serve as their internal advocate to innovate appropriately.

NEW USE CASES

Be clear on the challenges your customer is looking to solve with your solution. Train as needs and use cases evolve.

SCALE YOUR EFFORTS



Customer
Support

 zendesk



INTERCOM

DRIFT

CSMS

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Product
Led
Growth

walk**me**



pendo®



Appcues

Product
Analytics



pendo®



HEAP

Customer
Feedback

Delighted



USERVOICE

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ADOPTION MISTAKES TO AVOID

1.

**FIGURE OUT
THE BEST
PRODUCT
METRICS TO
TRACK
ADOPTION
FOR YOUR
SOLUTION**

2.

**DON'T IGNORE
PRODUCT
ADOPTION
WHEN
CONSIDERING
CUSTOMER
HEALTH**

3.

**DON'T
ASSUME
BECAUSE
YOUR
CUSTOMERS
ARE USING
THE PRODUCT
THEY ARE
HEALTHY**

4.

**DON'T
ASSUME THAT
USAGE AND
ADOPTION
ARE THE
SAME THING**

5.

**ENSURE
ADOPTION
EVOLVES
OVER TIME**

THANK YOU