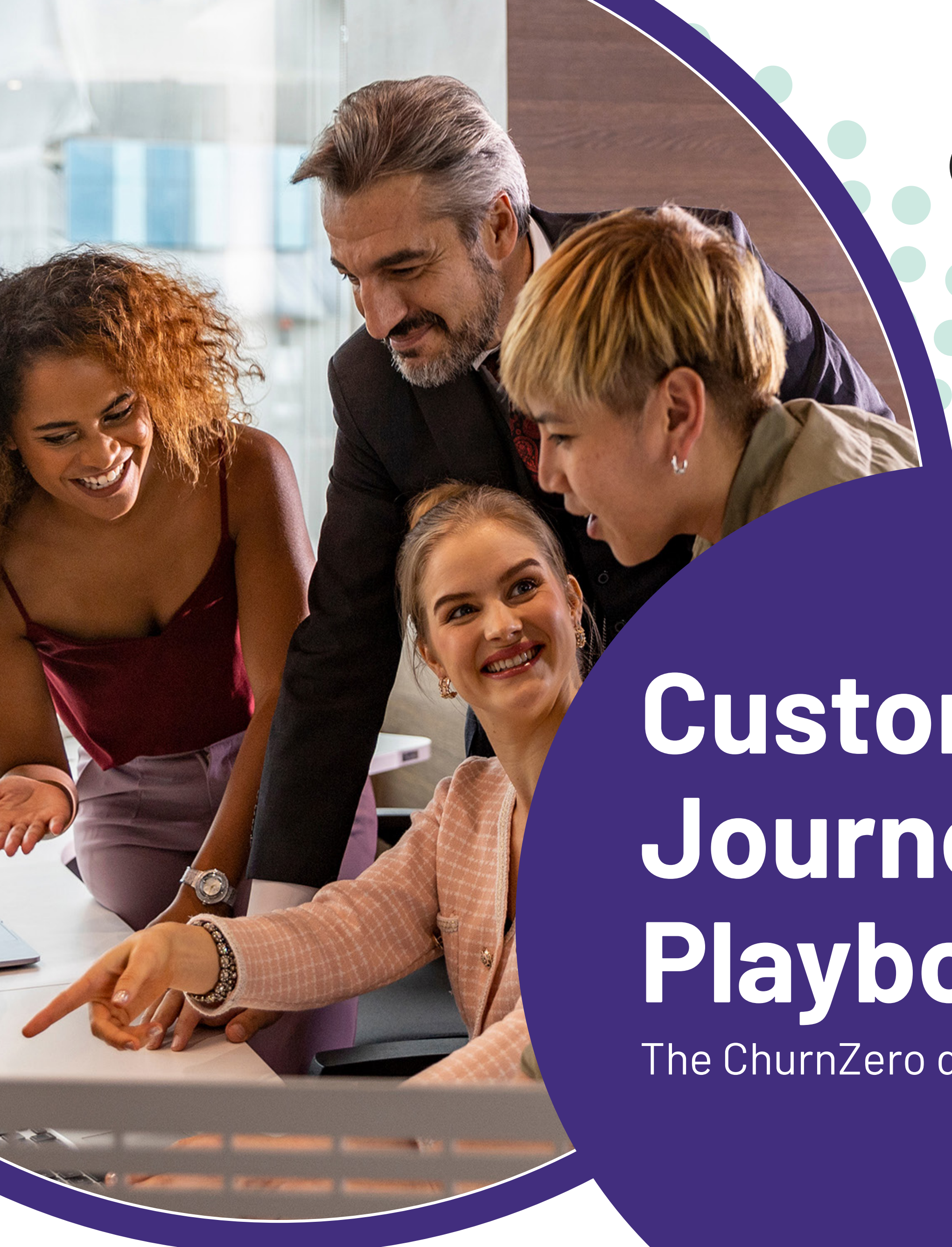

Customer Journeys and Playbooks

The ChurnZero dynamic duo

Top-of-class automation is one of ChurnZero's superpowers. When you use Journeys and Playbooks, on their own or in tandem, it streamlines communications, improves the customer experience, and reduces the time your team spends figuring out the process.

But what are Journeys and Playbooks? And how do they differ from each other?

Journeys

Journeys are project plans that guide customers from the starting point to the determined goal, measuring success against an expected timeline. With automation, progress tracking, and external sharing built in, Journeys allow Customer Success (CS) teams to create repeatable and saleable roadmaps for every customer experience.

Progress markers of Journeys:

- **Milestones:** Representing essential deliverables or events, milestones correspond to phases in the Journey composed of time-bound tasks and achievements.
- **Tasks:** Action items to be completed by a team member (could be internal or a customer).
- **Achievements:** Smaller goals or steps that are completed within the milestone leading to the completion of a milestone.

Value of Journeys:

- **Streamline workflows:** Reduce manual mistakes and align customers and internal team expectations.
- **Repeat and scale:** Create once and use infinitely. With the ability to duplicate, and easily upgrade Journeys for different personas or experiences without starting from scratch.
- **Driven by progress:** Always be aware of the status of your customer Journeys and proactively course-correct using real-time insights.
- **Deepen relationships:** Journey completion is a team effort, with the ability to share progress reports and milestone checklists with customers, easily involve them in their own success and celebrate the completion of milestones along the way.

Playbooks

Playbooks are automated workflows that make communicating with and managing customers in a multitude of situations easier. Plays are built to command outreach with consistency, efficiency, and measurability—without sacrificing the human element. With control over the precise timing of each step, Playbooks ensures communications and actions happen at the right time to the right people.

Playbook communications:

- Email messages
- In-app messages

Playbook automations:

- Update fields for contacts and accounts
- Add steps to other automation
- Create tasks
- Send information to integrated systems

Value of Playbooks:

- **Increased efficiency:** Built-in automation of Playbook steps allow CS teams to streamline engagements and otherwise manual tasks, allowing the team to focus on more complex tasks.
- **Relevant engagements:** Never miss an opportunity to engage with customers with sequence-based steps that allow you to configure emails or announcements triggered by actions or events.
- **Proactively address concerns:** Conditionality of Playbook steps can identify customer behavior in real-time, empowering CS teams to prevent predictable concerns and provide more personalized customer experiences.

Playbook Situations

Survey response follow-up

Your customer submitted a promoter or detractor response.

Playbook—Email

Email from CSM to promoters thanking them for their thoughts and partnership. To detractors: email from CS manager to ask for additional feedback, make them feel heard.

First impressions

A new user logs in for the first time.

Playbook—In-app announcements

Don't leave new users to fend for themselves, and don't leave them digging through your email for guides. For each new user, send a weekly series of in-app announcements with tips on navigating their new platform upon first login. If possible, use a contact role field to tailor the content to the specific user and their needs.

Accurate engagement data

Gone are the old ways of logging calls and meetings manually.

Playbook—Automation

Build an account segment based on logged activities or past meetings to trigger a Play that updates a custom "last engagement date" attribute. Customize this Play for each customer tier to easily keep up with recurring meeting types—EBRs and QBRs.

Create a Play that automatically sends an email if you've gone too long without a review to ensure the customer is never left wondering if they're still a priority.

Upsell opportunity

You understand your customers best, so act on it when you see that they can benefit from add-ons or upgrading to a higher platform tier.

Playbook—Email

Create an email template library using manual Plays that your CSMs can draw from when a customer may be a fit for a new feature. They can add the account to the one-off playbook to spark excitement and start the conversation.

Exceeded license utilization

When accounts exceed resources, it can be an awkward conversation. Let the platform handle the first notification.

Playbook—Email

Using a segment of accounts who are over 100% of their license utilization, automatically send a notice to customers alerting them of their overage with instructions on purchasing more licenses.

Low usage data

If you notice specific customers aren't using the platform to its full potential, or simply aren't logging in enough, there's a simple way to nudge them back to being engaged.

Playbook—Email

Get this customer reengaged with a series of automated Play emails informing them of new features, best practices, or existing templates. Give them a chance to log back in and set up a follow up task a few weeks later to check-in.

Feature updates

Your product team just announced some exciting and high-value feature enhancements, get users excited and curious, so they can benefit from the new releases.

Playbook—In-app announcements

Convey your excitement and a quick how-to with an in-app announcement and a fun GIF. Copy this Play in the future to easily share additional enhancements.

Renewal reminders

Renewals tend to creep up on you, so set up an organized process to ensure it goes smoothly.

Playbook— Emails and automation

Create a Play (or Plays) to manage the entire renewal cycle for each customer. Start with an automated email to key contacts to schedule time for goal and progress discussions. Follow it with a series of tasks, in-app announcements, and emails to ensure pricing is sent. Once the opportunity is closed in your CRM, the customer is thanked for another year of fantastic partnership.

Managing renewals with Plays ensure no renewals get missed and there are no surprises for your customers during renewal season.

Journey progression

When a customer is stuck within a Journey, give them a nudge to help them work towards that next achievement and milestone.

Playbook—Email and in-app announcements

While Journeys are mapped out for the ideal process, sometimes customers get stuck for several reasons. A simple and scalable way of getting them back on track is to set up automated emails or in-app messages as a gentle reminder of what their next step should be, getting them to focus on reaching that next milestone.

Journey Situations

Scenario

Sales just closed a deal, and now you're preparing resources and timelines to onboard the account.

Journey: Account onboarding

You have your end goal in mind: successful onboarding. To ensure a smooth implementation, create an onboarding Journey to ensure all teams and users are appropriately set up for success.

Tip: Create the first milestone with tasks belonging to you and your sales team for a smooth handoff.

Playbook—In-app announcements

Onboarding can be a stressful time, and everyone has a different pace. Capture engagement as soon as curious users enter the platform with in-app messages that deliver tips and tricks for new users, ideas on how to use the platform, and more.

Playbook—Emails

Additionally, you can set up automated emails to acknowledge achievements made on the customer end or celebrate hitting milestones.

Scenario

One of your CSMs just closed an opportunity for an add-on feature.

Journey: New feature onboarding

You may have an initial onboarding Journey already created, but this account requires special attention to make sure the add-on feature is implemented correctly.

Tip: The great thing about these Journeys is they can be duplicated with one click. Copy the default onboarding Journey and add or remove milestones based on the specific needs of this feature implementation.

Playbook—In-app announcements

Easily automate in-app announcements for different pages or modules of the new feature to ensure users understand the purpose, value, and relevant use case behind each feature.

Playbook—Emails

If you have additional resources for the add-on feature, such as templates or best practice guides, easily automate that with an email so clients receive it at the most relevant stage.

Scenario

In addition to each customer's specific goals, product adoption is critical to ensuring the success of a customer.

Journey: Adoption

Map out the ideal product adoption path using Journeys to easily track product usage and encourage increased use of features. Use automatically completing achievements to easily track usage milestones for each key factor, without any additional work from your CSMs.

This Journey gives your product team insight into how long it takes for all customers to adopt (or not adopt) certain features.

Playbook—Emails

Product adoption is a big deal, so celebrate your customer's achievements and milestones along the way by automating emails that acknowledge the work they put into implementing your product into their workflow.

Scenario

A client has decided not to renew. While it may be a sad goodbye, there's a lot to be done in the off-boarding process.

Journey: Offboarding

When a client chooses to leave, it's certainly not best practice to just hit the shut-off button when their contract comes to an end. Instead, create a simple offboarding Journey where the team can complete internal to-dos such as updating admin fields, exporting relevant data, and most importantly, taking the time to understand the churn reason.

By creating a Journey for this process, your team ensures the proper steps are taken for each client offboarding, allowing insights to be gathered.

Playbook—Emails

If you have specific off-boarding resources or best practices to share, such as where to download all your data and the last date to do so, automate an email to deliver the information to the right users.

Scenario

The team is growing, shifting, and changing. Regardless of the reason, inevitably you run into the stage of transitioning your accounts from one CSM to another.

Journey: CSM transitions

Account transitions can be hectic, both internally and externally. Take time to understand what's needed on both sides to make the transition clear, concise, and stable. Then throw those steps together in a CSM-transition Journey!

This Journey will help with the pain of any transitions, by outlining the checklist of actions to consider and communications to be made. Ensure that your CSMs can confidently handle any transition and give assurance to the clients who are experiencing the change.

Playbook—Emails

Take it a step further and automate an email informing customers of the transition before the new CSM is introduced. Streamline the messaging to ensure that all customers understand the decision and feel supported throughout the change.

Scenario

You're preparing for a series of customer training courses with multiple teams involved. Think implementation, product, support, and more.

Journey: Customer training

Regardless of the session, there's a simple outline of tasks the team should perform when preparing for their portion of training. From scheduling the slots for sessions to preparing the decks, a Journey help cross-functional teams say on top of prepping for each training with a clear process and plan.

Tip: Use ChurnZero to send a CSAT survey following each training session

Playbook—Emails

Once courses are scheduled, automate confirmation and reminder emails with a Playbook for seamless communication.