MASTER CLASS PRODUCT TRAINING WEBINAR

The ClientSuccess Engagement Report

WEDNESDAY, NOVEMBER 9
12PM EST/ 9AM PST



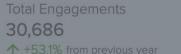
KRISTEN GRAY PSYCHAS

SR. CUSTOMER SUCCESS MANAGER
ClientSuccess

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If you want to drive more valuable conversations with your customers, the only way to start is by measuring them.



Emails
28,538

↑ +54.7% from previous year

2,028

 \uparrow +34.4% from previous year

Meetings
49
↑ +226.7% from previous year

Chats
71 Client success
1 +7.6% from previous year

Top CSM Engagements 2022

ENGAGEMENT REPORT VALUE PROPOSITION



LEADERS

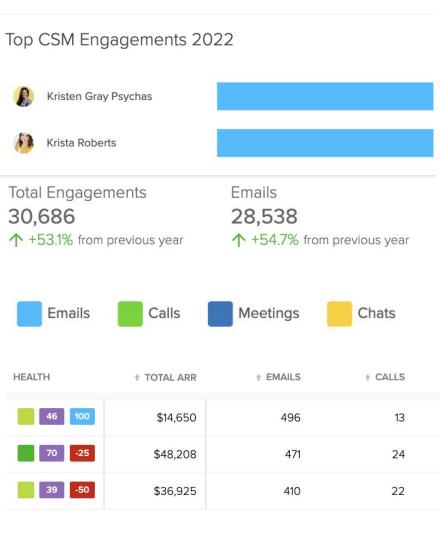
Establish a benchmark of how effectively your customer team is operating in alignment with business objectives, and work towards improvement in a data-driven way

ADMINS

Configure reports to measure things like upsells, churn mitigation discussions, and assess the ability of your current team to prioritize the right conversations at the right time

END USERS

Gain an effective way to show your work. Eliminate misclarity in your efforts to preserve and deepen customer partnerships. Demonstrate customer trends through data to drive meaningful internal change



Assessing customer impact through a new lens: one of certainty

- Qualitative data
 - What is the nature of the discussions your team members are holding with customers?
- Quantitative data:
 - Be certain that your team is effectively prioritizing high value customers over the noisy ones
- It all comes down to dollars and cents
 - Be certain that your customer team
 is operating as a profit center.
 - is operating as a profit center
 Be certain that everyone is participating in the commercial success of the business

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