

MASTER CLASS PRODUCT TRAINING WEBINAR

The ClientSuccess Engagement Report



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client**success**

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

Total Engagements

30,686

↑ +53.1% from previous year

Emails

28,538

↑ +54.7% from previous year

Calls

2,028

↑ +34.4% from previous year

Meetings

49

↑ +226.7% from previous year

Chats

71

↑ +7.6% from previous year

client **success**

Top CSM Engagements 2022

ENGAGEMENT REPORT VALUE PROPOSITION



1 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

2 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

3 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

Top CSM Engagements 2022



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HEALTH	↑ TOTAL ARR	↑ EMAILS	↑ CALLS
46 100	\$14,650	496	13
70 -25	\$48,208	471	24
39 -50	\$36,925	410	22

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
 - Be certain that everyone is participating in the commercial success of the business

PLATFORM DEEP DIVE