

MASTER CLASS PRODUCT TRAINING WEBINAR

The ClientSuccess Customer Pulse Reason Report



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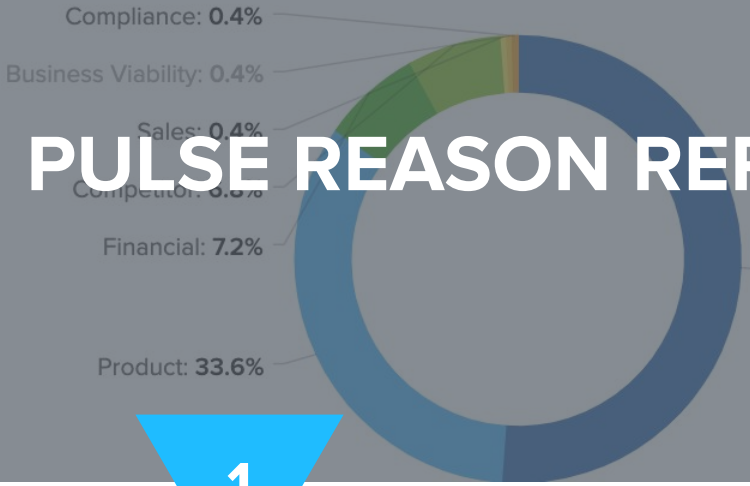
WEDNESDAY, NOVEMBER 16
12PM EST/ 9AM PST

brought to you by

client**success**

**Don't sleep on optimizing your
customer Pulse strategy—the
effectiveness of your next
board deck relies on it**

PULSE REASON REPORT VALUE PROPOSITION



LEADERS

Track and measure customer sentiment in assignable, actionable ways that help you effectively tell the story of your customer base and earn the resources you need



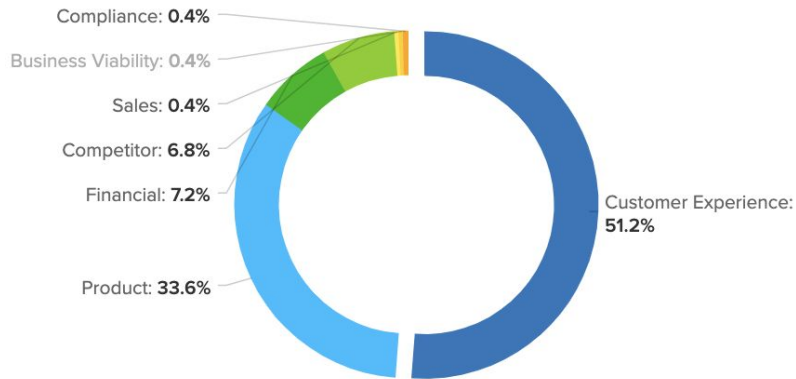
ADMINS

Collect data that is based in **recency** and **reality** to help drive your customer success strategy. Provide the template to end-users to know what level of data to gather from their respective portfolios

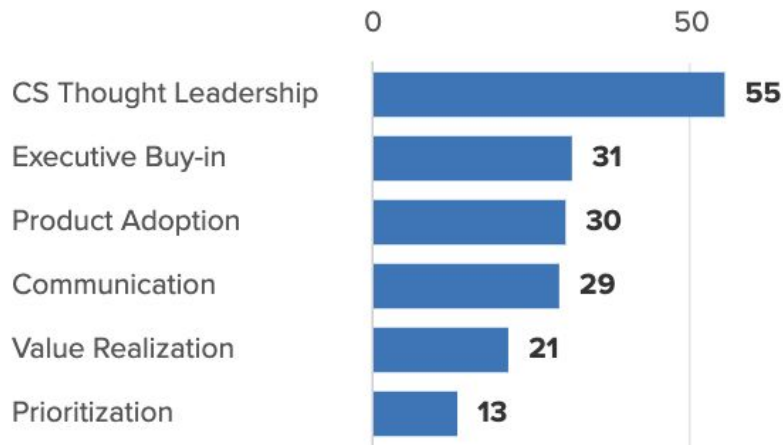


END USERS

Quit having so many groan-worthy discussions with your customers! Identify customer pain points and log your customer call notes in a single fell swoop to make the impact to your product, service, or organization to drive retention



Top Success Factors



The Makeup of an Effective Pulse Strategy

1. Recently updated reason codes that are both **actionable** and **assignable**
2. Pulse level definition: what does it mean when a customer is 'fairly satisfied' vs 'at some risk'?
3. Pulse update expectations: to support executive reporting needs, how recent should Pulses be updated to accurately inform a course of action?
4. Know your "business why" so you know what to do to effectively follow-through on your findings

PLATFORM DEEP DIVE