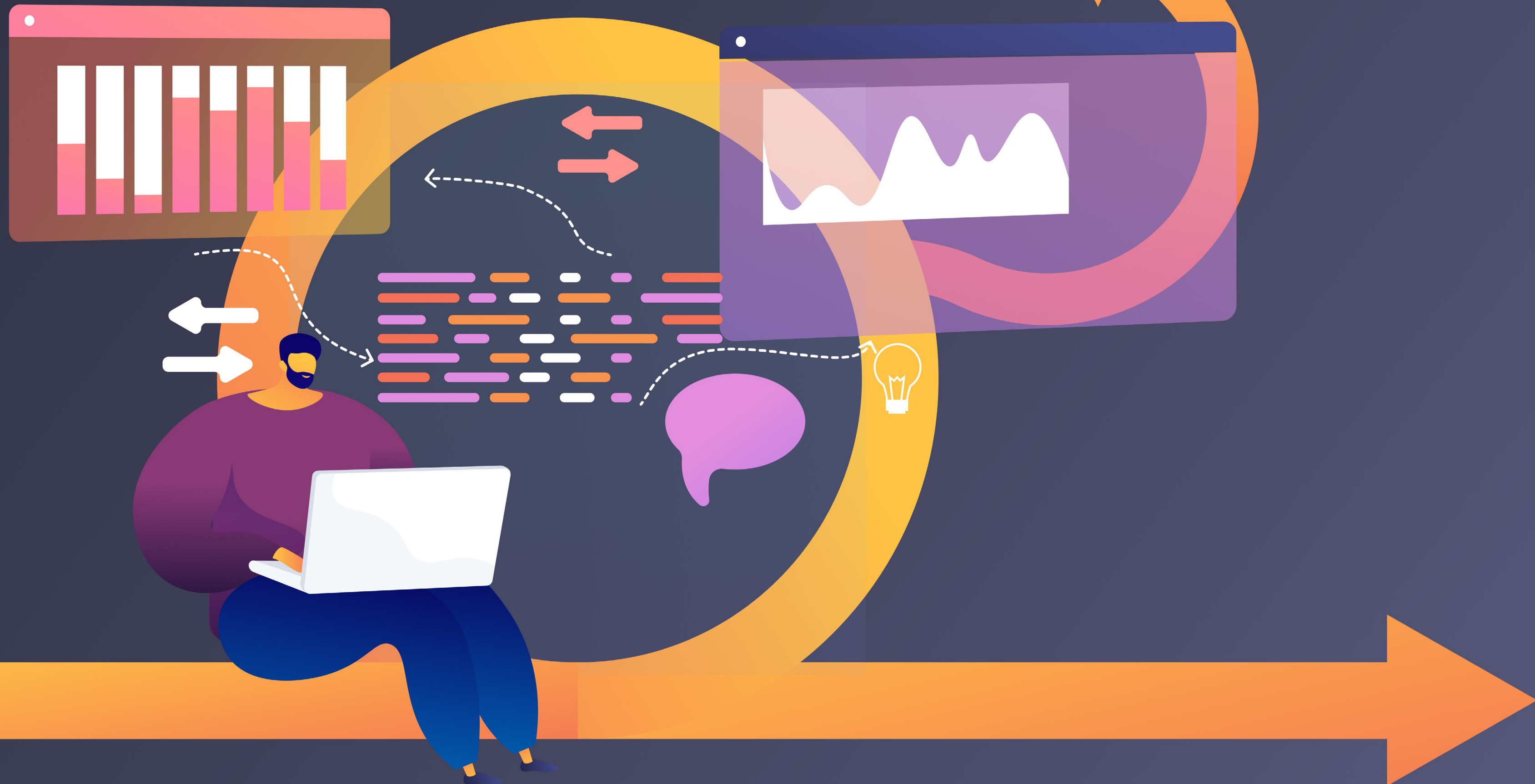


# Personalizing the Customer Experience

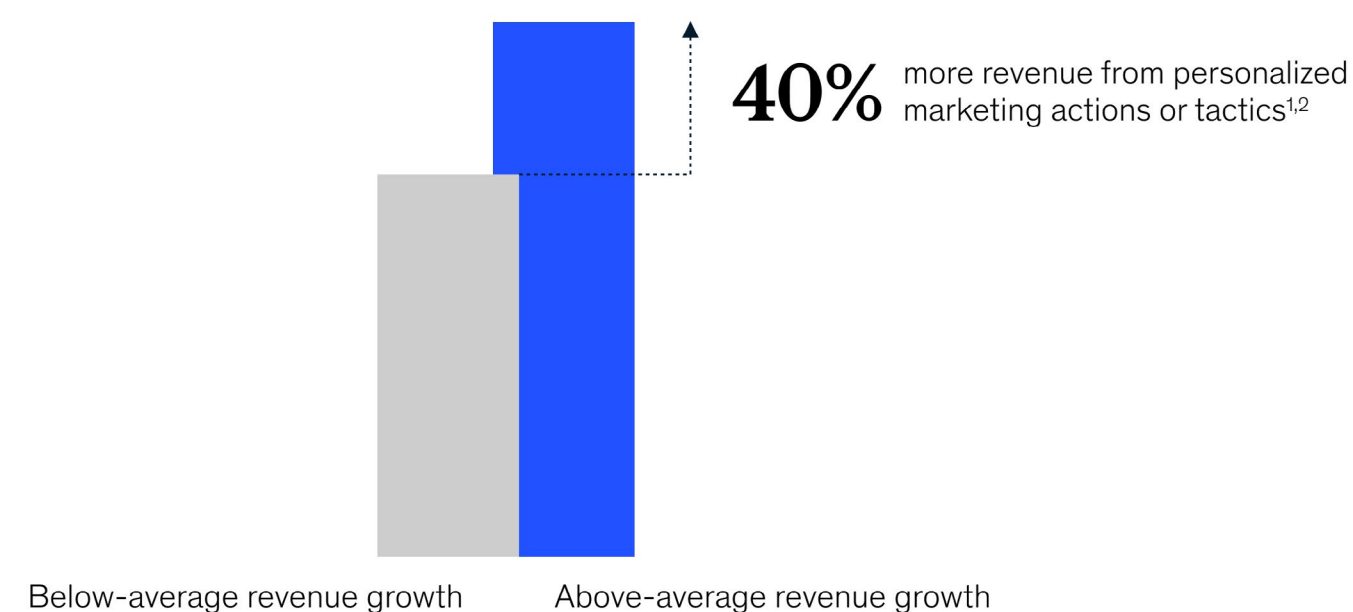


# Contents

Personalizing the Customer Experience	3
Why Personalization Matters in Customer Onboarding	4
Increasing Engagement and Adoption	5
Reducing Time-to-Value (TTV)	6
Building Trust and Loyalty	7
How Technology Can Help You Personalize Onboarding	8
Automated Workflows	9
Collaborative Onboarding	10
User Journeys and Milestones	11
Summary Sheet	12
Conclusion	13
FAQs	16

# Personalizing the Customer Experience

Companies that capture more value from personalization grow faster.



<sup>1</sup> Companies divided into two groups based off past-year revenue growth; top half classified as higher growth and bottom half as lower growth.  
<sup>2</sup> Question: "What % of your revenue comes from personalized marketing actions/or tactics?" Possible responses: values from 0 to 100%.  
Source: McKinsey Next in Personalization 2021 benchmarking survey, 2/7-2/14/2021 (n = 20) sampled among consumer companies without direct consumer relationship (eg, CPG)

McKinsey  
& Company

*Personalization drives performance and better customer outcomes. Companies that grow faster drive 40% more of their revenue from personalization than their slower-growing counterparts.*

McKinsey

You've heard it before - **"the customer is king"**.

Some customers even think they are different from the rest and deserve special treatment.

Instead of your CS team getting frustrated, maybe it's worth considering that these customers might be right?

These days, in order to put your company ahead of the competition, you need to think more about how you can tailor your product and service to specific customer needs.

Customers are no longer satisfied with generic 'one size fits all' solutions and interactions.

Instead, your customers demand personalized experiences that are based on their unique needs and preferences.

The key point for setting up your customer for success while using personalization strategies is during onboarding. So, let's look at why personalization matters so much during onboarding and how you can leverage technology to help you with it.

# Why **Personalization** Matters in **Customer Onboarding**



## Setting the Stage for Success

Onboarding is one of the first real touchpoints with your product and service - outside of sales, obviously.

So, it's an ideal time to set the stage for your customer's ongoing success with you.

There's no better way to do this than to personalize the experience, to make them feel valued as a customer and entirely understood from the outset.

Putting in the extra effort now will reap dividends in the future during a successful long-term relationship.



# Increasing Engagement and Adoption

The chances are that as soon as the customer smells a 'generic' approach to onboarding that doesn't accommodate their needs, they will disengage.

This disengagement could be small at first - perhaps not paying attention during a session or not prioritizing future meetings with you - but over time it's almost certain to lead to churn.

This is where a personalized onboarding experience can really become a game-changer for you.

By simply demonstrating to the customer that you're invested in helping them solve their problems - and not foisting generic solutions on them - they're going to engage more with you and ultimately adopt your product for the long term.

*Personalization drives performance and better customer outcomes. Companies that grow faster drive 40% more of their revenue from personalization than their slower-growing counterparts.*

McKinsey



**Ankit Aggarwal** - Lead, CS Enablement  
@ MoEngage

*Based on the data that we have, CSMs get a birds-eye view of the customer, helping us deliver a hyper-personalized experience to customers.*

# Reducing Time-to-Value (TTV)

As you well know, one of the key metrics you should be focused on during the onboarding process is TTV - or **time to value**.

Instead of guiding your customers through a soul-crushing tour of every generic feature or use case for your product - we've heard of basic training for a niche-specific SaaS taking a solid 4-weeks! - it's time to get personal with them.

By focusing on the features and benefits that are a great fit for your customer and their needs, you can help them achieve their goals more quickly - which will lead to increased satisfaction and loyalty overall.



# Building Trust and Loyalty

Everyone likes to feel listened to and understood.

If you continue to persist with a 'one size fits all' approach, it will alienate your customers.

Instead, using a personalized onboarding experience shows your customers that you understand their specific needs and challenges - and actually care about helping them solve them.

This dedication to their cause builds trust and loyalty, making it more likely that the customer will stay with you in the long run.





# How Technology Can Help You Personalize Onboarding



Companies that automate onboarding tasks register 16% better retention rates.

**99Firms**

Customer	Industry	Time since onboarding	Health Score	Count	Website	Revenue	Churn
<input type="checkbox"/> JB Ebay	Enterprise	6 months ago	●●●●●	20000	ebay.com	2k	139
<input type="checkbox"/> JB Github	Enterprise	3 months ago	●●●●●	179	github.com	12k	5
<input type="checkbox"/> JB Mailchimp	Enterprise	9 months ago	●●●●○	57	mailchimp.com	72k	7
<input type="checkbox"/> JB Spotify	Enterprise	11 months ago	●●●●●	89	spotify.com	78k	121
<input type="checkbox"/> JB Intercom	Enterprise	1 months ago	●●●●○	280	intercom.com	121k	55
<input type="checkbox"/> JB Mixpanel	Enterprise	a year ago	●●●●●	345	mixpanel.com	78k	67

## Customer Segmentation

One of the first steps in personalization is understanding who your customers are.

Customer Success Platforms will often include analytics tools that allow you to segment your customer base using options like industry, company size, or usage behavior.

Having a customer journey that caters to specific ICPs (ideal customer profiles) and target segments gives you the chance to get ahead of the curve and plan what the common issues are for a company of 'X' size in 'Y' industry.

This helps you to semi-personalize the experience before the customers even mention their specific needs or issues.

Laying this groundwork early will help the customers know they've chosen the right vendor and feel comfortable that you'll set them up for success during onboarding.



**Estimated time saved:** 3 hours per CSM per week.



# Automated Workflows

Of course, personalization doesn't just have to mean configuring the implementation of your product to perfectly meet your customer's needs.

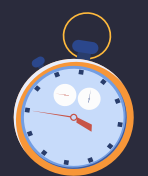
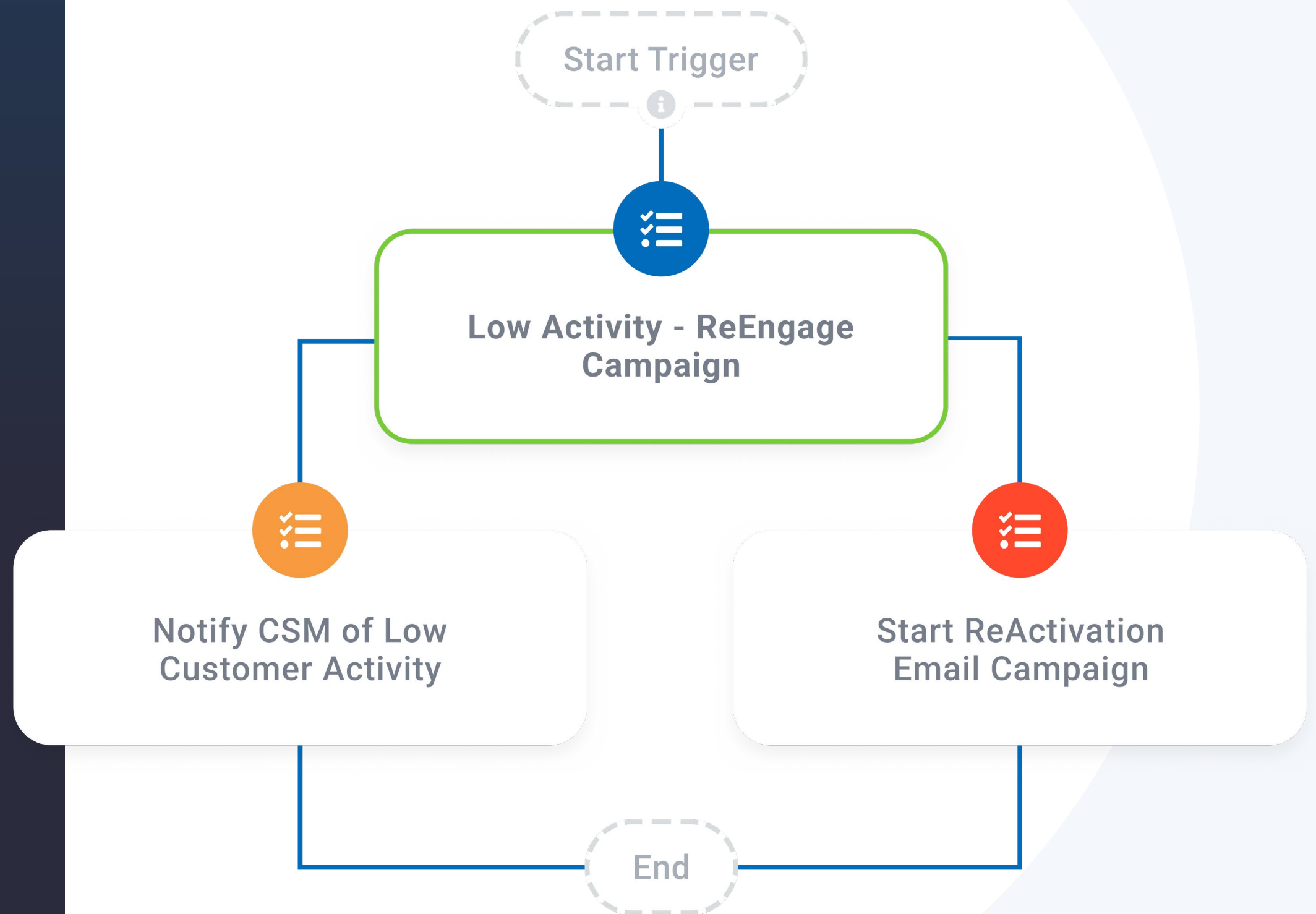
It can also mean personalizing their overall experience with you based on their behavior.

Automated workflows are a great example of this.

Imagine for a second that your customer hasn't logged in and used your product since you did a training session with them last week. We know it's difficult to imagine because your training is great - but work with us here.

To help overcome this and get the implementation back on track, your customer success platform could be configured to automatically send them a targeted email with resources to help them get started.

What makes this personal? Well, not every customer will get this. Your customers who have disengaged will - so it's a personalized event based on their behavior.



**Estimated time saved:** 5 hours per CSM per week.

# Collaborative Onboarding

Custify <> ACME

It helps to strengthen the customer relationship and provides a transparent, secure and open forum for collaboration.

[Welcome](#)
[Onboarding timeline](#)
[Next steps](#)
[Usage](#)
[CSMs](#)

## Onboarding Portal

Custify & ACME

I'm Anne Smith, your Custify customer success specialist. I will be your main contact during your onboarding.

Reach out to me anytime at [contact@custify.com](mailto:contact@custify.com)

Your CSM will help with all the guidelines to enable the native integrations available (CRM, financial/ticketing/email integrations), but you will have to perform some steps on your own, as we do not have access to your 3rd party systems.

Frank Jason: Had a call with them regarding their integration api and provided firther documentation... Top Client Apr 17

Frank Jason: Followed up with them regarding their trial experience. Positive feedback so far. Onboarding Jun 23

One of the key ways to get your customers engaged in the implementation process is transparency and genuine partnership.

Your customers want to know what is happening at every stage of the implementation project and that they are involved in decision-making.

To help with this, some customer success platforms offer a dedicated customer collaboration portal, which helps transform your implementation process from a 'black box' of mystery into an open and collaborative process.

This change in approach enables you to not only keep customers informed but to genuinely take their perspective onboard during each phase of implementation, helping the whole process to feel more personalized as a result.



**Estimated time saved: 3 hours per CSM per week.**

# User Journeys and Milestones

Every customer is different. There, we said it.

As much as you want every customer to follow your exact 'cookie cutter' journey that would make all implementations super efficient and a breeze to manage - sadly this isn't a reality for most implementation teams.

Customers have conflicting priorities for their time to work with you.

Customers have other internal projects running in conjunction with your implementation, which will often be a dependency for you to finish on time.

So, to plan around all this unique uncertainty, you're going to have to map out a personalized user journey with milestones aligned to these specific issues and tailored to a satisfactory outcome for your customer.

Thankfully, a dedicated CSP makes this incredibly easy to manage and gives you countless options to adjust, adapt, and personalize your onboarding experience for them.

Custify <math>\leftrightarrow</math> ACME

It helps to strengthen the customer relationship and provides a transparent, secure and open forum for collaboration.

Welcome Onboarding timeline Next steps Usage CSMs

## Onboarding

Custify & ACME

Hi, I'm Anne,

I am the Head of Customer Success at Acme and I'll be your main contact person during your onboarding.

Reach out to me anytime at [contact@acme.com](mailto:contact@acme.com)

### Custify Onboarding Timeline

- Meet your CSM to define your business goals
- Define success for your product use case
- Step by step guide for your development team
- Import your data & set up a pre-configured instance
- Train your team



**Estimated time saved:** 2 hours per CSM per week.



# Summary Sheet

Your 'At a Glance' Guide to Personalize the Customer Experience



## Manual Process

- ✗ One size fits all' customer journey
- ✗ Non-existent or basic workflows
- ✗ Collaborate via email
- ✗ Limited understanding of customer progress

## Personalized Onboarding

- ✓ Customer Segmentation
- ✓ Automated Workflows
- ✓ Collaborative Onboarding
- ✓ User Journey and Milestones

## Time Saved

**3 hours per week**

**5 hours per week**

**3 hours per week**

**2 hours per week**



We all know how much customers value a high-quality experience - and that inferior experiences can lead to churn.

But how can you use personalization to improve your CX? To help inspire you, we suggested 4 key ways you can use personalization to enhance the way you do customer success:

- ✓ Customer segmentation - provide the right experiences relevant to specific customer types
- ✓ Automated workflows - set up automated workflows that are triggered by specific customer actions
- ✓ Collaborative onboarding - use a customer portal to create a more engaging onboarding experience
- ✓ User journeys & milestones - track user progress and respond based on their current position

If you want to take advantage of the benefits that personalization can bring to the experience you offer customers, then you should strongly consider using a **CSP - like Custify** - to give you all the tools and technology you need to get started.

# Conclusion



# Conclusion



Philipp Wolf, Founder & CEO - Custify



Personalization is key in today's customer success landscape, and at Custify, we're here to show you how a CSP can revolutionize your approach. By leveraging Custify, you can expect to see not just improved engagement and faster time-to-value, but also stronger loyalty and retention rates. Let's empower your CSMs to create personalized experiences that resonate across the customer journey.

Imagine having the tools to create highly personalized customer experiences that boost product adoption, reduce churn, and uncover upsell opportunities—all from one easy-to-use platform.

With Custify, this is possible. Here's what our platform offers:

- ✓ **Enhanced Customer Experience (CX):**  
Refine communication to elevate customer experience.
- ✓ **Proactive Management:**  
Handle customer needs in real-time.
- ✓ **Centralized Data:**  
Access all customer information in one place.
- ✓ **Actionable Tasks:**  
Stay on top of customer progress.
- ✓ **Health Insights:**  
Quickly assess and respond to customer health.
- ✓ **Predictive Analytics:**  
Anticipate future trends and events.
- ✓ **Seamless Integration:**  
Connect with your favorite tools seamlessly.

## Personalize The Experience For Your Customers With Custify



See how Custify can help you create personalized customer experiences

[Request a Demo](#)

# FAQs

## **Q: How can personalization improve the customer journey?**

Using personalization helps you to improve the customer journey by tailoring experiences for your customers based on their preferences and actions. By making these experiences more relevant and meaningful, it will increase engagement, satisfaction, and loyalty, ultimately helping to boost retention and profitability for your company.

## **Q: Will personalization make my CSMs more efficient?**

We estimate that using personalization as part of your approach to CX will save your CSMs several hours each week on tasks they may have performed manually before. However, one of the key benefits of personalization is the positive impact it makes on the experience for your customers and the potential for increase retention as a result.

## **Q: What sort of personalization are we talking about here?**

A customer success platform (CSP) will help you create more meaningful and personalized experiences your customers. Using functionality like customer segmentation, automated workflows, collaborative onboarding, and the easy tracking of user journey and milestones means you can create relevant and personalized experiences that wow your customers and keep them engaged with your product for the long term.

## **Q: How can adopting technology, like a Customer Success Platform (CSP), help you to use personalization better?**

Adopting a Customer Success Platform (CSP) will be instrumental in helping you add significant personalization across the customer journey. The technology has been developed specifically to help make customer success easier to perform for CSMs, while improving the experience for your customers through personalized and highly relevant interactions with your company.



