

Planable Success Story



Enhanced efficiency and improved customer engagement.



Client Overview:

Planable is a platform that helps social media managers streamline content approval processes and efficiently manage multiple accounts, providing a centralized space for seamless team and client collaboration.

Industry: Technology, Information & Internet



The Challenges:

- **Inefficiency due to multiple tools:** The team struggled with moving between different systems, which made it hard to stay organized and productive.
- **Fragmented customer data:** Without a single source of truth, the team faced challenges in maintaining accurate and comprehensive customer records.
- **Inadequate customer tracking:** The reliance on manual tracking methods made it hard to gain real-time insights into customer status and needs.
- **Reduced customer focus:** The extensive time required to manage multiple tools took away from the team's ability to provide personalized and timely customer support.



Solution with Custify:

Planable implemented Custify with concierge onboarding. Here's what happened:

- **Segments:** Custify allowed the creation of specific segments for enterprise and self-service customers, enabling tailored onboarding processes and communication strategies for effective support.

- **Health Scores:** By replacing manual spreadsheet tracking, the team could monitor customer health accurately and know when to reach out, improving customer retention and satisfaction.
- **Playbooks:** Custify's Playbooks sent automated emails and created tasks based on specific triggers, freeing up valuable time and allowing the team to focus on strategic activities and personalized customer care.
- **Tasks and Alerts:** Custify's Tasks and Alerts ensured timely notifications about important customer events. For instance, notifications for failed invoices allowed for quick resolution, and alerts based on health scores enabled proactive engagement, resulting in improved customer satisfaction and retention.



The Results:

Since implementing Custify, Planable has:

- **Increased Efficiency:** By centralizing customer data and automating tasks, Planable significantly reduced the time spent on manual processes, allowing the team to focus more on strategic initiatives.
- **Improved Customer Engagement:** The use of Health Scores and tailored communication through Playbooks enabled more timely and relevant interactions, enhancing overall customer satisfaction and retention.
- **Proactively Managed Customer Success:** Automated alerts and notifications allowed the team to address customer needs more quickly, leading to faster issue resolution and a better overall customer experience.



“Before Custify, I juggled multiple platforms and tasks, struggling to keep track of everything. Now, everything is centralized, and I can focus on our customers without getting lost in mundane work. We've become more efficient, and our ability to engage and support our customers has greatly improved.”

Noa Lupu, Customer Success Lead at Planable



Take action – improve your customer success now.

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