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Leveraging Automation
For a Smoother Customer Journey

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If you're a keen student of the world of customer success, you'll have seen all sorts of changes come into play over the years.

However, in the same way that customer success is constantly evolving, at the same time, some things never change.

The one thing that'll never change in customer success? The need for CSMs to be hyper-efficient.

As your business scales, managing an ever-growing list of customer accounts becomes increasingly complex.

The manual processes that you used to use when you had a handful of customers will ultimately become useless as your customer base expands.

Supporting this growth is where automation comes into play. It serves as the 'secret sauce' behind creating a smooth and seamless customer journey every time.

With this in mind, in this chapter, we will explore the role of automation in customer success and investigate the types of tasks that can be automated to save CSMs some serious time.

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The Role of Data in Customer Success

Scalability

Above all else, using automation allows you to quickly improve the scalability of your customer success services.

As your customer base grows, using automation within your CSP allows you to manage more accounts without proportionally increasing the workload of your CSMs.

This enables you to maintain high levels of service quality even as you scale, without service delivery costs increasing at the same rate.
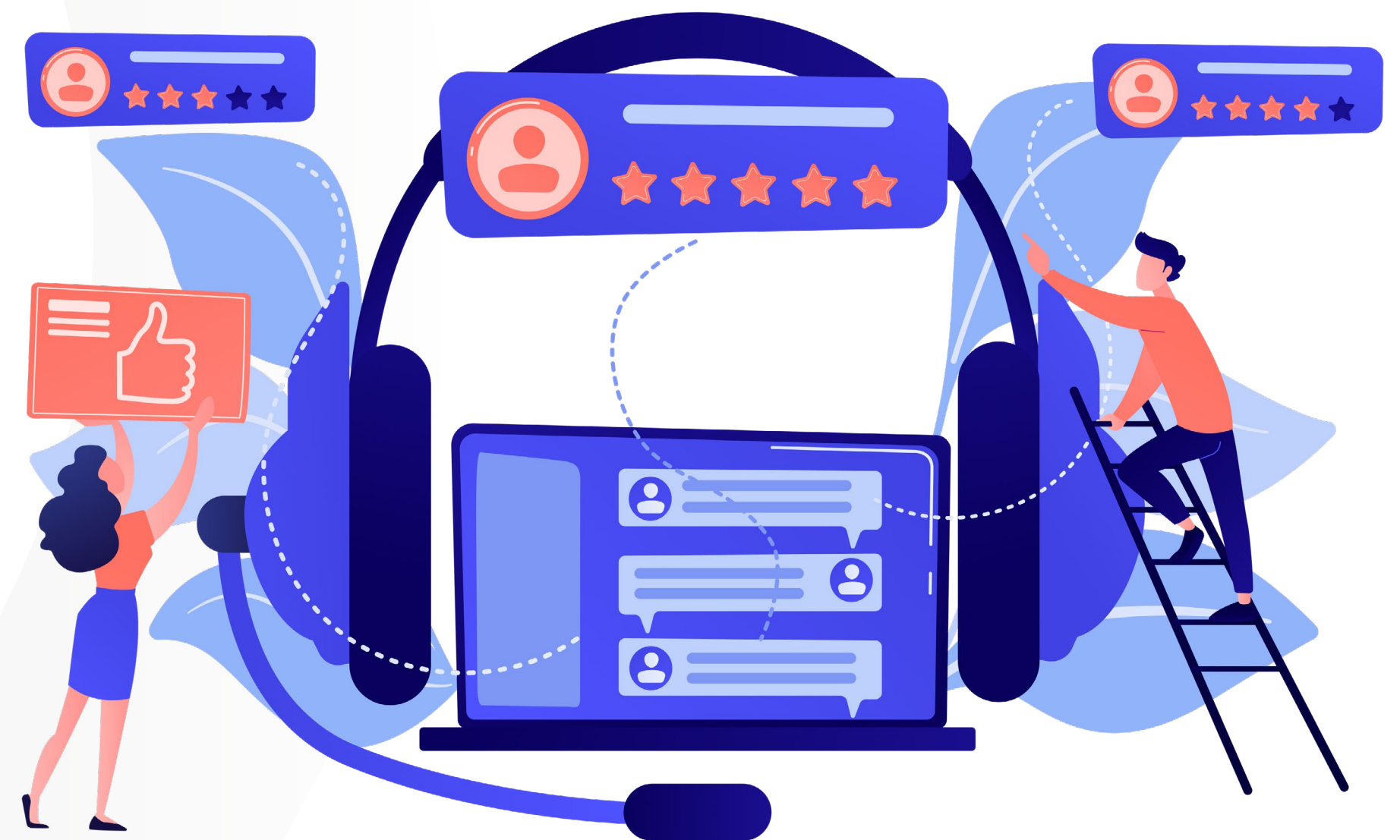
Consistency

We all know that CSMs work exceptionally hard to service their customers.

As a result of working so hard, we also know that errors can creep in when they're least expected.

By using automation to supplement your processes, it makes sure that every customer receives the same high-quality experience, without any errors, regardless of who is managing their account.

This is because automated workflows and processes are designed by their very nature to eliminate human error and ensure that predetermined best practices are followed at all times.

Enters Segment New Customers

Welcome to our Company

Plan is Basic

no / yes

Schedule a onboarding call

Wait for 25 days

Enters Segment Churned

End

Time-Saving

As we've previously mentioned, time is the most precious resource when it comes to customer success.

Using automation to underpin the way your teams work means that you can single-handedly free up your CSMs from routine or repetitive tasks.

Not only does this make your CSMs happy, but it also allows them to focus on what they do best - strategic thinking, relationship building, and problem-solving.

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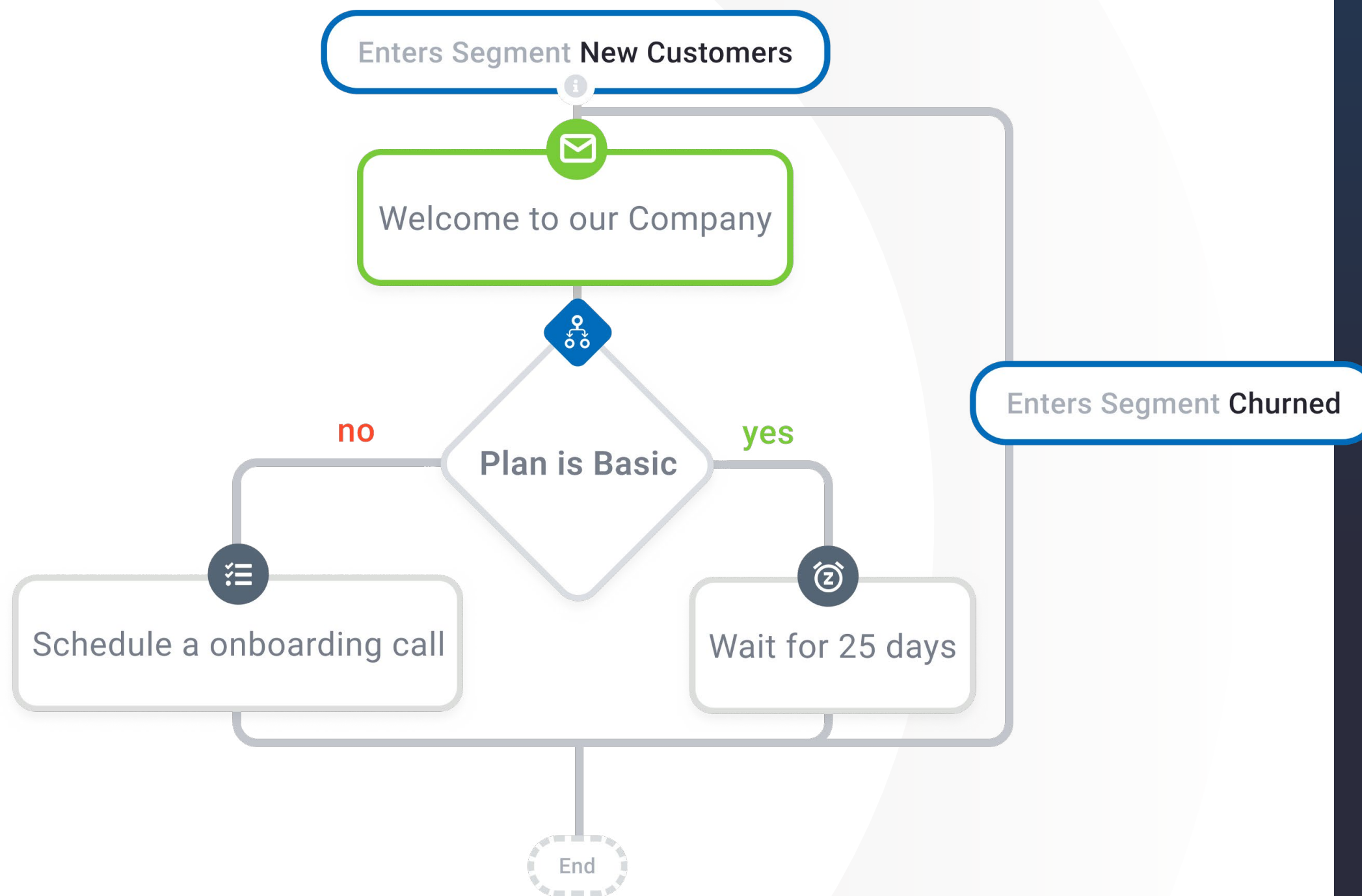
You're no doubt starting to see how this all comes together now.

In our previous chapter on personalization, we outlined just how crucial a more personalized approach is to customer success.

Automation allows you to deliver these ultra-important personalized experiences at scale.

For example, different customer behavior can trigger different email sequences to be delivered to them, so it feels like the information they're seeing is entirely in context with what they're working on - rather than a generic email with limited value sent to all customers.

Using automation to handle all this behind the scenes, frees up your CSMs to build better relationships with your most important customers.
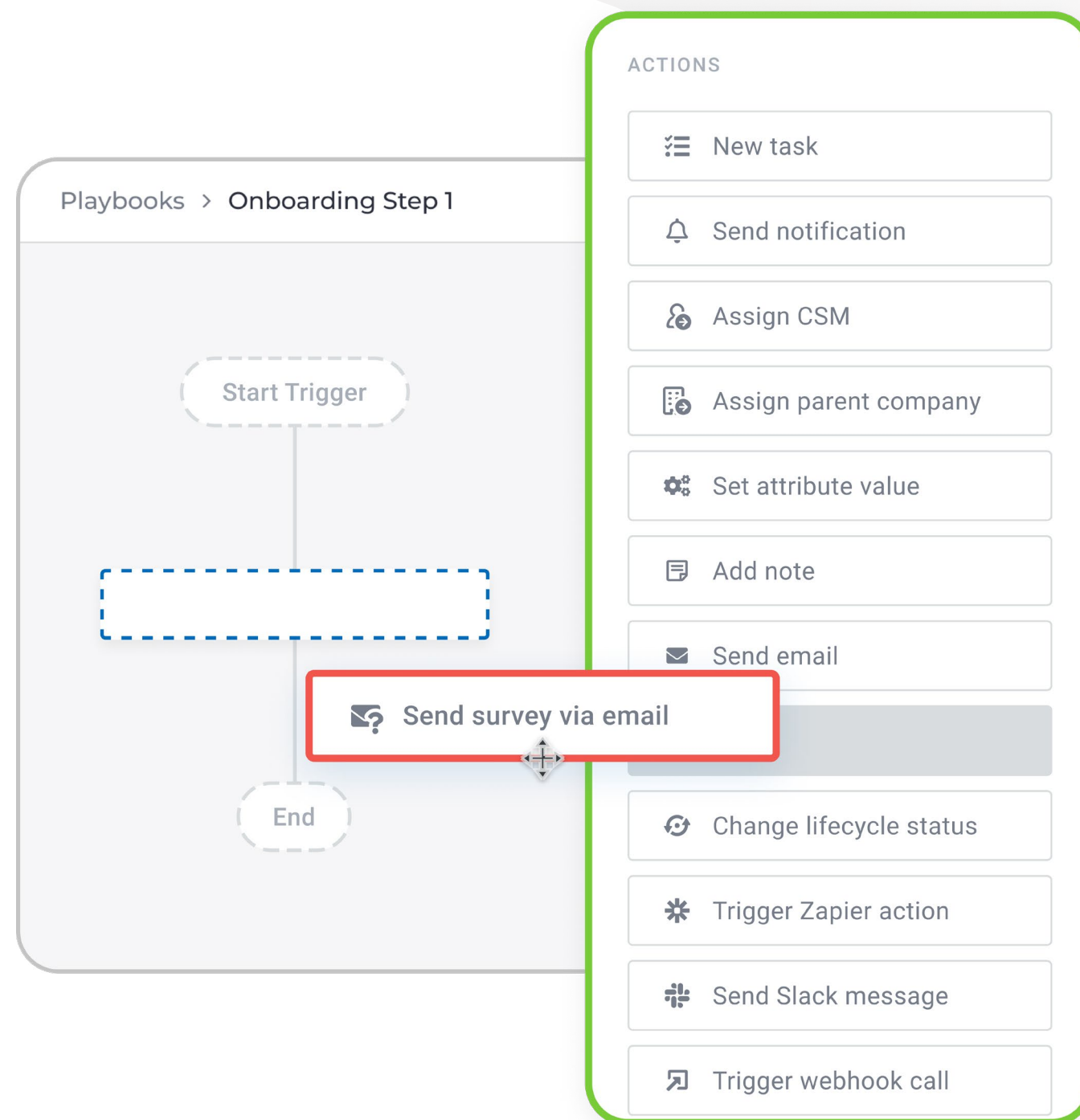
Personalization at Scale

Elisabeth Courland - CS Ops @ Agorapulse

I use technology to remind users to complete their setup, push unused modals to users with videos, boost adoption, and encourage renewal (monthly to yearly subscription).

Tasks That Can Be Automated

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ACTIONS

- ≣ New task
- 🔔 Send notification
- 👤 Assign CSM
- 📑 Assign parent company
- ⚙️ Set attribute value
- 📄 Add note
- ✉️ Send email

Playbooks > Onboarding Step 1

Start Trigger

Send survey via email

End

- 🔄 Change lifecycle status
- ✳️ Trigger Zapier action
- 🔗 Send Slack message
- ↗️ Trigger webhook call

✓ Onboarding Processes

✓ Communication and Notifications

✓ Data Collection and Analysis

✓ Customer Segmentation

✓ Reporting

Onboarding Processes

The onboarding phase is a critical tool for you to use in setting the tone for the ongoing relationship with your customer.

Automating key workflows within the onboarding phase can help you:

✓ Guide new customers through the initial setup,

✓ Provide them with relevant resources,

✓ and even schedule introductory calls with CSMs.

As a result, the use of automation not only ensures a smooth and engaging onboarding experience - but can save your CSM significant time as well.

Estimated time saved: 4 hours per CSM per week.

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Communication and Notifications

Customer Success Platforms are continuing to evolve at pace, and part of that evolution sees them now able to automate a variety of communication tasks, including:

✓ Renewal reminders

✓ Product updates

✓ Satisfaction surveys

On top of this, CSPs can also offer real-time notifications, which will alert you and your CSMs about any number of customer activities, like:

✓ Customers reaching a milestone

✓ Customers encountering an issue

✓ Customers failing to use the product

Rob Stevens - Senior Director, CS @ iBASEt

If you've got good telemetry around value drivers and can tie that into a customer success platform, you can give your customer nudges... in real-time... exactly where needed.

Estimated time saved: 1-2 hours per CSM per week.

Data Collection and Analysis

As we've mentioned already, data is vitally important for customer success.

Without it, you're constantly in reactive 'fire-fighting' mode, and no longer have the time or energy to do high-quality proactive engagement with your customers.

Using a customer success platform as the 'brain' or 'heartbeat' of your CS function allows you to integrate with all the other platforms in your business and automatically bring together all the various data points into one central space.

This data can then be automatically analyzed using inbuilt tools within your CSP to provide actionable insights - and even predictive analytics - to help you and your team make more informed decisions.
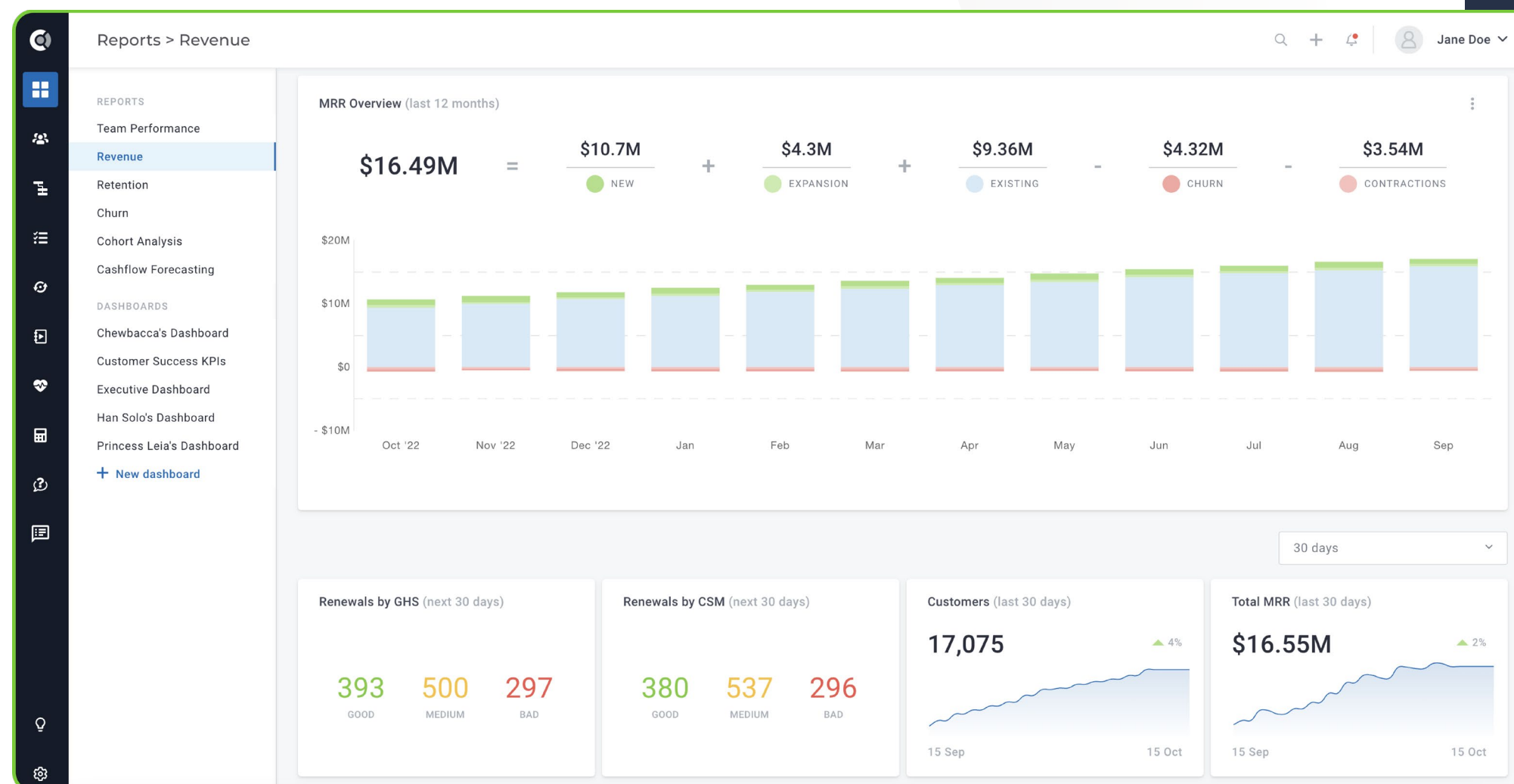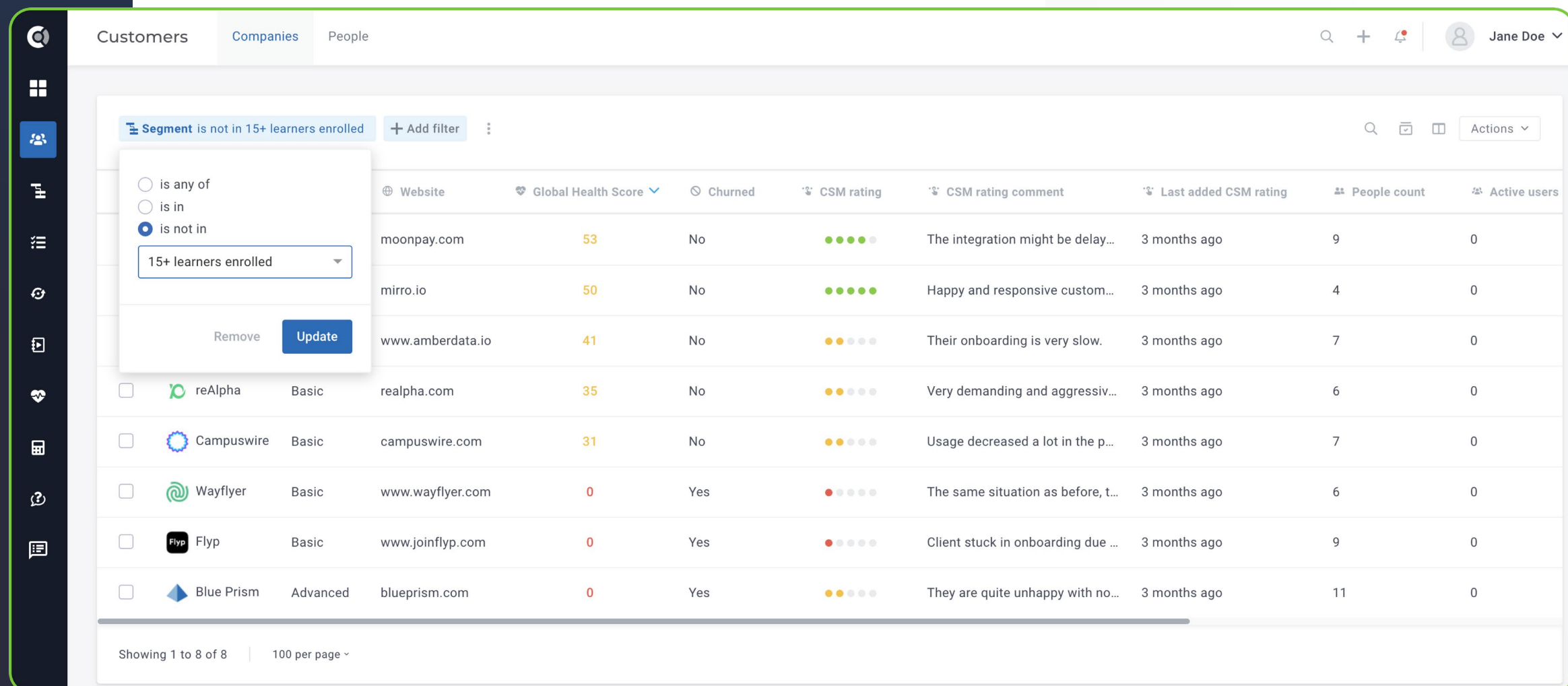
Estimated time saved: 3 hours per CSM per week.

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Customer Segmentation

You can also use automation to help you segment your customer base.

By looking at your customer using criteria like industry, usage patterns, or revenue potential, you can start to formulate a robust customer journey plan that is specifically designed for that segment.

As a result, this automated segmentation enables you to develop a more targeted and effective customer communication strategy - and also allows you to tailor your services to different customer segments.
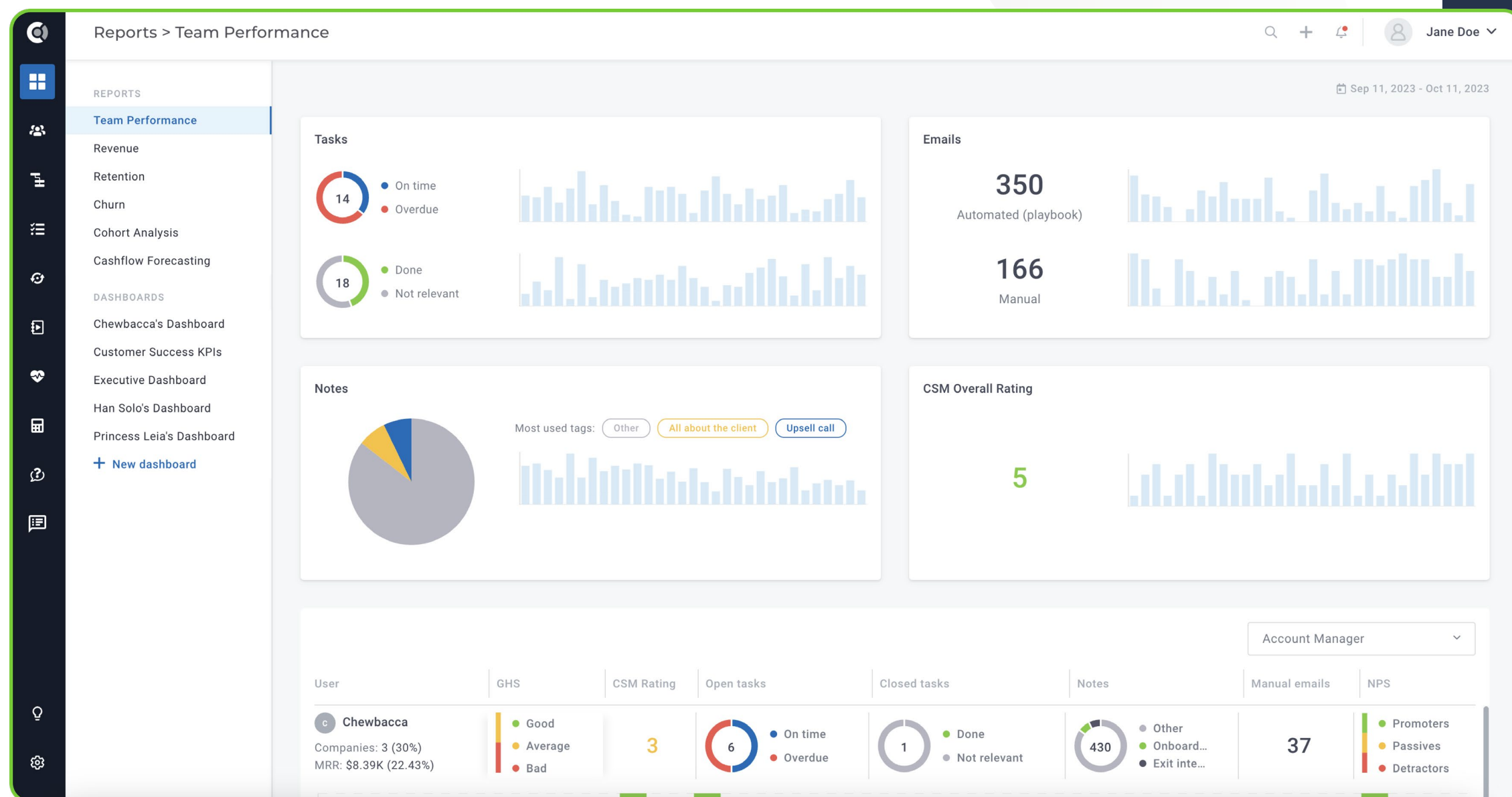

Estimated time saved: 2 hours per CSM per week.

Reporting

Producing high-quality, data-driven reports is a perennial challenge for CSMs everywhere.

They're time-consuming, often difficult to do, and can quickly become strewn with errors.

Thankfully, automated reporting can ease the burden on CSMs by generating detailed reports on customer health, engagement levels, and other key metrics - all at the click of a button.

These reports can also be set up to be run at specific intervals, so that everyone is kept up-to-date on customer success performance, without your CSMs having to spend countless hours producing reports.

Estimated time saved: 7-10 hours per CSM per week.

Summary Sheet

Your 'At a Glance' Guide to Leveraging Automation For a Smoother Customer Journey

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Manual Process

❌ Human-driven onboarding

❌ Sending individual customer emails

❌ In-depth data analysis

❌ Treating all customers the same

❌ Hand-collated reports

Automated Tasks

✓ Onboarding Processes

✓ Communication and Notifications

✓ Data Collection and Analysis

✓ Customer Segmentation

✓ Reporting

Time Saved

4 hours per week

1-2 hours per week

3 hours per week

2 hours per week

7-10 hours per week

Conclusion

CSMs are expected to be ever more efficient with their time and deliver against both revenue and retention targets, but the trouble is there are still multiple tasks they have to do each week that eat up their precious time.

To help overcome this, we suggest automation as a way to not only help your CSMs but improve your customer journey, too. We outlined some of the biggest benefits you can expect when you leverage automation, including:

- ✓ **Scalability** - being able to serve more customers without fear of burnout

- ✓ **Consistency** - making sure that the service you offer is of the same high quality every time

- ✓ **Time-saving** - reducing the time spent on repetitive or manual tasks

- ✓ **Personalization** - by using automation, you can personalize your service more easily than ever

In order for you to take advantage of the benefits of automation, we suggest you should consider a customer success platform (CSP).

Conclusion

Philipp Wolf, Founder & CEO - Custify

As CEO of Custify, I can confidently say that automating key customer journey processes can save your CSMs over 20 hours a week. That's valuable time better spent directly engaging with your customers.

With a customer success platform, you can automate processes like onboarding, communication & notifications, data collection & analysis, customer segmentation, and reporting.

If you're looking to harness the benefits of automation and elevate your customer success strategy, Custify is here to help you every step of the way.

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What if you could make your CSMs more efficient, boost product adoption, reduce churn, and identify upsell opportunities—all from one platform?

Custify gives your customer success team everything they need to simplify and automate their tasks, enabling them to:

✓ **Enhance CX and Reduce Churn: Improve your customer journey through smart automation.**

✓ **Proactive Management: Manage customers in real-time.**

✓ **Centralized Data: Gather all customer data in one place.**

✓ **Health Insights: Easily understand customer health at a glance.**

✓ **Predictive Analytics: Get clear insights into past and future trends.**

✓ **Seamless Integration: Connect with your favorite tools to centralize operations.**

Automate and Improve Your Customer Journey With Custify

Want to learn more about how Custify can help you add automation to your customer journey?

Request a Demo

FAQs

Q: **How can automation improve the customer journey?**

Automation can help to improve the customer journey by adding in-built scalability to handle growing demand, consistency in service quality and significant time savings through efficient processes, as well as personalization tailored to individual customer needs. As a result, by leveraging automation, your customers can expect a seamless, responsive, and memorable experience with your company.

Q: **What parts of the customer journey can you improve with automation?**

Key areas in the customer journey that you can improve with automation include onboarding processes, communication and notifications, data collection and analysis, as well as customer segmentation and reporting. Using automation to make these improvements will drive a more effective and personalized customer experience leading to outsized results for your team and your customers.

Q: **How efficient could my CSMs be with automation?**

By making the most of the possibilities that automation can offer, we estimate that your CSMs could shave as much as 20 hours each week off their repetitive or manual tasks. This then frees up your team to do what they do best - work directly with customers on high impact issues and help them maximize the results they get from using your product.

Q: **How can adopting technology, like a Customer Success Platform (CSP), help you with automation?**

Adopting a Customer Success Platform (CSP) is ideally placed to help improve the way you automate and improve key processes across the customer journey. The technology has been developed specifically to help make CSMs more efficient whilst delivering a consistently excellent experience for their customers.