

A photograph of a woman with blonde hair, wearing a blue denim shirt, standing with her arms crossed and holding a smartphone. The background is a blurred office setting with colorful diagonal stripes in shades of red, orange, yellow, and green.

USE CASE 2

CREATE A CLEAR VIEW AND IMPROVE THE CUSTOMER LIFECYCLE

Andie is the Head of Global Customer Success at a multinational computer software company. Her unique challenge when coming to Kilterly was to figure out how her customers were behaving across different regional segments and train up global teams to the unique definitions of customer success.

“One big issue we had was customer renewal,” said Andie. “We saw it vary wildly from product to product and regionally. Our teams had one-size-fits-all customer success definitions that weren’t adequate for the unique needs they had. Because we didn’t have the data in an easy-to-see dashboard by country, we couldn’t preemptively support our customers’ health and wound up missing out on a lot of revenue.”

KILTERLY HELPED ANDIE IN A FEW WAYS:

- 1** First, she was able to create a dashboard portal for each of her regions and countries, to get a sense of the customer health metrics at each. Once established, each team under Andie was encouraged to create a baseline goal from these figures.
- 2** Next, the customer success and service departments teamed up to compare numbers and look at on-time renewal periods, identifying trends, and valleys in the data.

“This helped us ensure that customers got the right attention at the right time. It also structured, streamlined, and leveraged each team’s workflow around the unique customer lifecycle and define specific customer success KPIs for each area,” explained Andie.

- 3** Today, Andie and her teams have built out a customer lifecycle workflow and are able to deliver a personalized, streamlined customer experience to their varied pool of customers.

“Being able to send the right message to the right customer at the right time has completely transformed not only our customer retention but our customer success associate retention. Our associates no longer feel powerless to help clients who are upset or frustrated that they have to react to client issues rather than get a jump on delighting our customers.”