CHURNZERO

Small but Mighty CS Teams

Tips, Tricks and Best Practices from Your Peers

Where to Start

For smaller CS Teams, making the most of limited resources is everything. With that in mind, we asked fellow CS leaders to share their top tips for Small but Mighty CS Teams.

Check out these 4 suggestions on ways to make your team more efficient. These tips will only help you make the most of a lean team but will help you maximize every customer interaction.

How ChurnZero Can Help

Realizing you don't have the right tools for the job? Contact us at churnzero.net to learn about the impact a real-time Customer Success platform can have on your organization. Whether reducing customer churn and expanding current accounts, to increasing product adoption, ChurnZero's dedicated CS platform has the power to optimize your customer experience.

Streamlining Onboarding

"We have relied heavily on automation to help automate the onboarding process, guiding customers to a desired state right out of the gates."

-VP of Customer Success, F&B Software Firm

Automating the onboarding journey ensures every customer starts on the right foot. Consider how tools like automation can take human error out of the onboarding equation while still allowing for a personal touch.

Staying Organized

"When you're an account manager with a lot of clients, it can be difficult to manage projects and campaigns. Dashboards help prevent any tasks slipping through the cracks."

-CS Strategist, Marketing Software Firm

Dashboards can centralize your team's CS efforts and provide one-click access to everything you need to organize your day. An organized and efficient team starts with a single source of truth for all your customer information.

Uncovering User Insights

"It is vitally important to know how customers are using your platform in order to take advantage of a patterns... [one can] see an upsell opportunity or save a customer from churning by seeing a decline in usage."

-Director of Business Development, Mobile App Firm

Don't let your customer data sit idle and unorganized. Information from product usage, support software and other sources help you truly understand your customer. Trends in this data will provide insights you can act on.

Organizing Your Accounts

"The ability to segment our base in many different ways is very helpful ... it has made our CSM team much more efficient and effective."

-Customer Success Manager, SaaS Development Platform

Logical account segmentation is a key to scaling your business. Since CS is all about driving value and outcomes for specific customers, a tailored approach is a must. Segment customers into similar groupings. These can include demographics (revenue, size or industry) or even usage statistics (support tickets, license utilization or activities.)