



Customer Journeys: External Sharing to Reduce Churn

Agenda



Elly Easter

Account Executive

01

What we mean by collaboration

02

Why collaboration matters

03

How to leverage ChurnZero for stronger customer collaboration



Strong collaboration leads to...



54% reduction
In at-risk
customer revenue



Lower time to value



Mitigated failure to launch



Higher engagement & excitement



Stronger retention

Poll: At our company, the collaboration between our customers and us is important for our clients to thrive

**Strongly
Disagree**

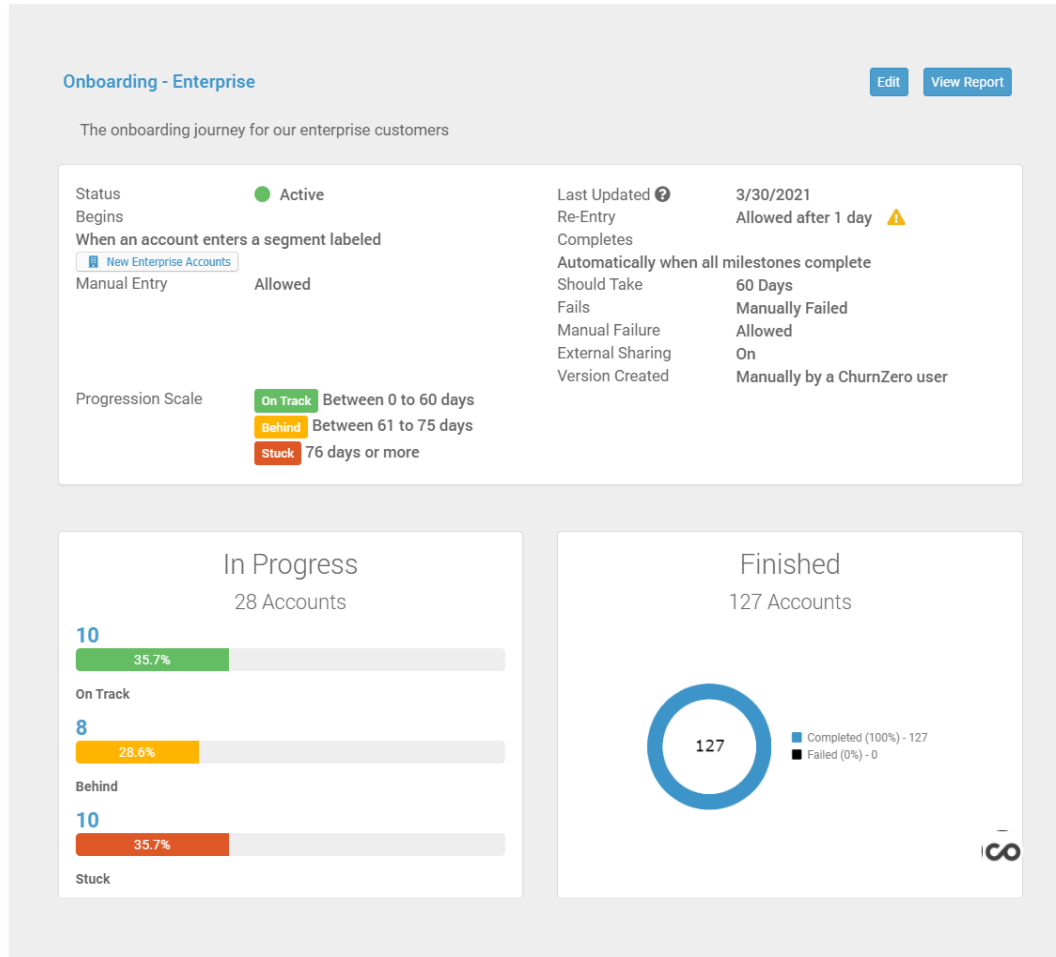
Disagree

Neutral

Agree

**Strongly
Agree**

Start with Building a Plan via Journeys



- Onboarding
- 90 Day Success plan
- Successful Year 1

Break it Down Into Milestones

“Break a large project into smaller chunks to make it easier for a customer to wrap their head around what needs to happen next to move forward.”



Kristen Hayer
Founder & CEO
The Success League

				Add New Milestone
Name	Begins	Steps	Milestone Should Take	
⚡ Kickoff Call and Account Configuration	When this Journey Starts	3 Achievements 5 Tasks	21 Days	Edit
⚡ Training	After Kickoff Call and Account Configuration completes	3 Achievements 2 Tasks	21 Days	
⚡ First Quarterly Call	Manually	3 Achievements 2 Tasks	18 Days	

Don't be Vague

Assign Tasks & Achievements

"Too often, companies' onboarding KPIs reflect their internal tasks & not the customers' real onboarding progress."



Kia Puhm
Founder & CEO
DesiredPath

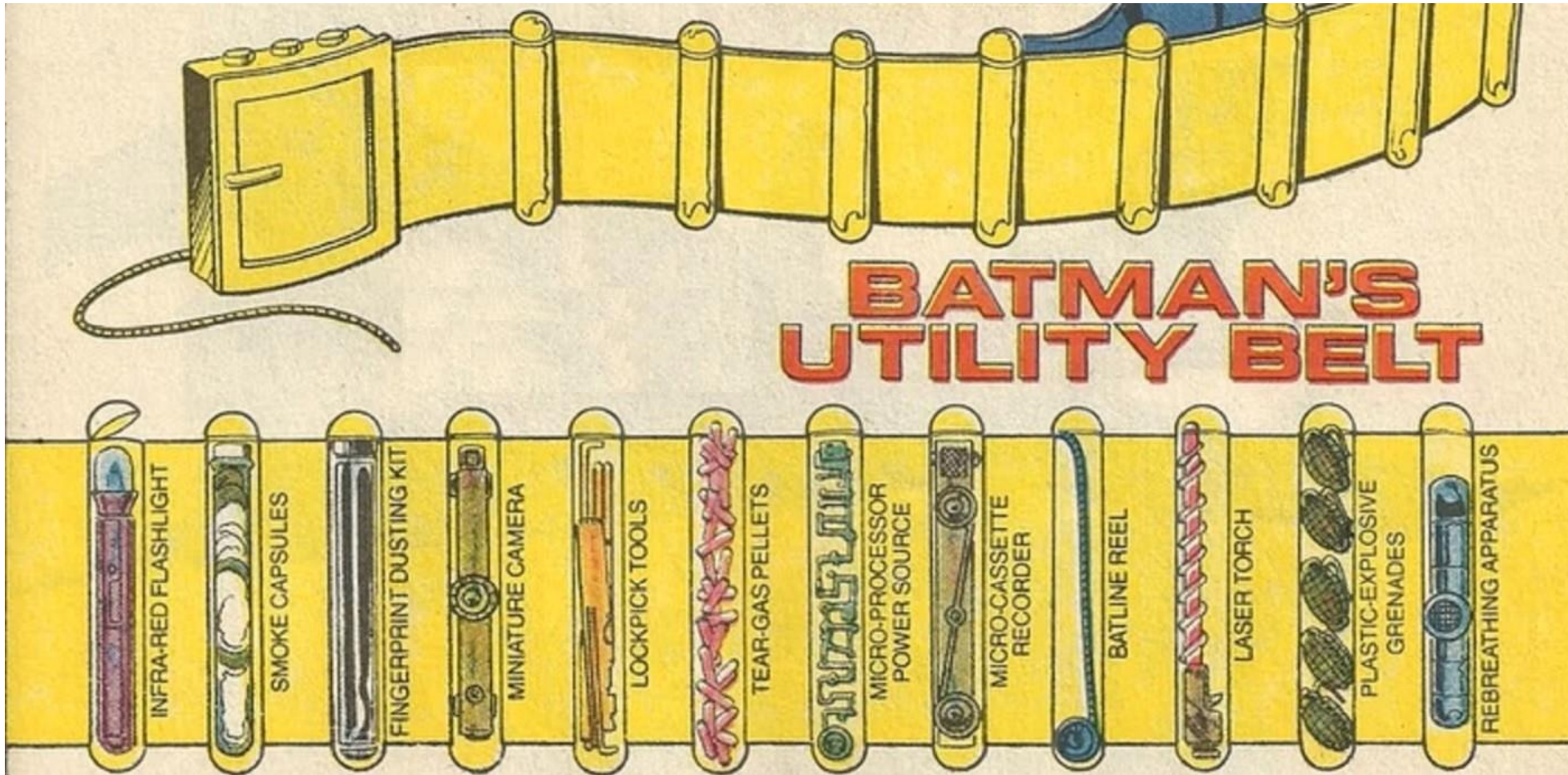
🏆 Achievements

Name	Required	Visible on Checklist	Visible on External Report	Step Completed By
❖ Configuration worksheet is completed		✓	✓	Manual
❖ Application Configuration completed	✓	✓	✓	Segment
❖ Initial Log in	✓	✓	✓	Segment

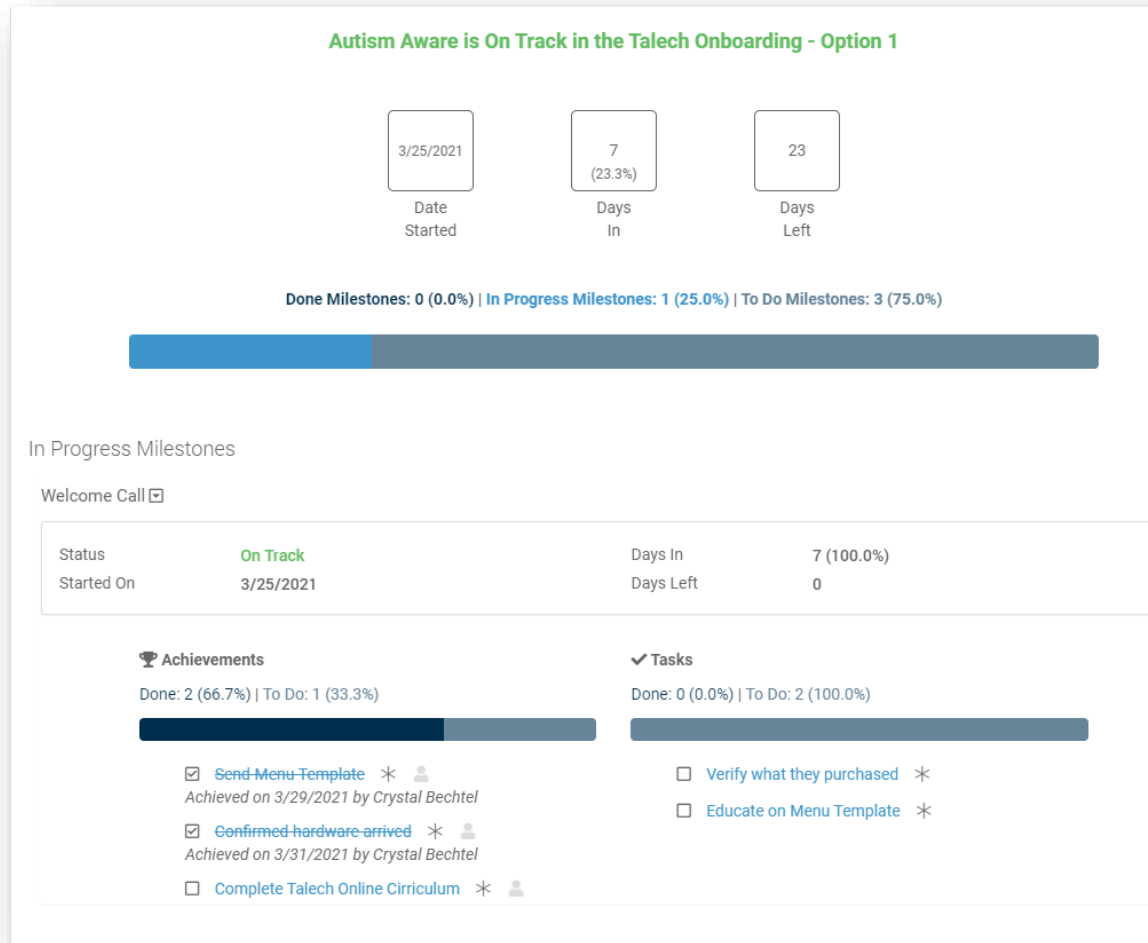
✓ Tasks

Name	Required	Visible on Checklist	Visible on External Report	Due In	Assigned To
❖ Sales/ CS conversation	✓		✓	10 Minute(s)	Sales
❖ Send Welcome Email	✓		✓	1 Hour(s)	Owner
❖ Schedule Configuration Call	✓		✓	5 Day(s)	Support Manager
❖ Complete Configuration Call	✓	✓	✓	7 Day(s)	Support Manager
❖ Complete Configuration Worksheet	✓		✓	10 Day(s)	Owner

Let's Make Your Customer the Hero



Get Customers Involved via External Journey Sharing



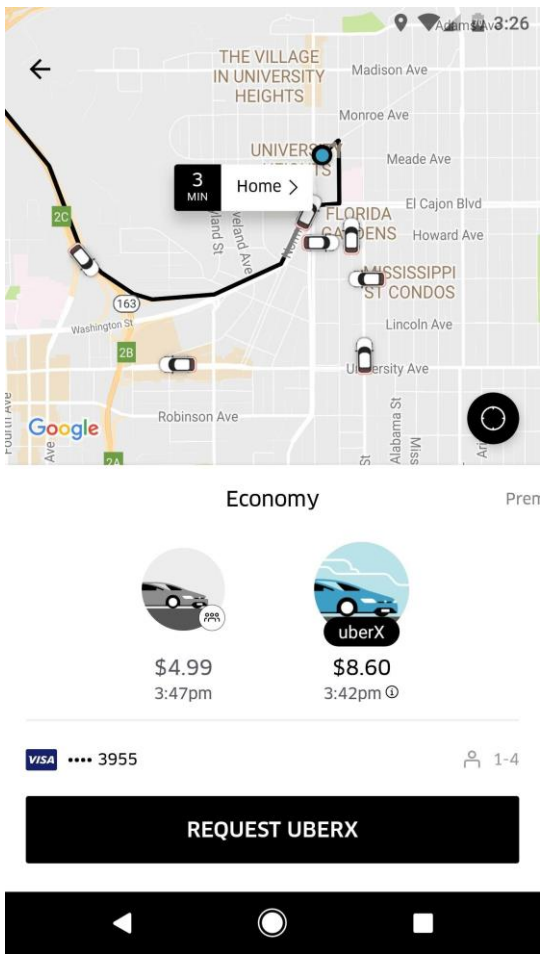
Inspire **confidence**
by showing the path

Set clear expectations &
timelines

Hold customers accountable

Encourage self-learning and
adoption of tools

As consumers, we all love status insight



The restaurant is preparing your food

The delivery ETA for your order from Buffalo Wild Wings is from **1:22pm - 1:32pm**. The order number is **17530455-0627657**.

If you have questions about your order, [contact the restaurant](#).

Shipment Tracking

Out for Delivery

Expected delivery: **Monday, June 8, 2015, by 8:00pm**

Your package is out for delivery and will arrive today. (Updated 0 minute(s) ago)



Tracking Details:

Monday, June 8, 2015 4:07 PM, Seattle WA US	Out for delivery
Monday, June 8, 2015 3:24 PM, Seattle WA US	Out for delivery
Monday, June 8, 2015 2:35 PM, Seattle WA US	Package arrived at a carrier facility
Monday, June 8, 2015 2:00 PM, Sumner WA US	Package has left seller facility and is in transit to carrier

Pushing towards a goal, we all love that feeling of accomplishment



Make it Fun & Easy via In-App Checklists & Messages

- ✓ See progress go up in real-time
- ✓ Give customers the feeling of achievement
- ✓ Gamify the experience



Name Dropper



Agree



Comment



Insightful



Answer



Event Speaker



Women In
Tech Affinity



Community
Ambassador



Early Adopter



Photogenic



BIG RYG



Pride Affinity

Talech Onboarding - Option 1

28%

Welcome Call ▾

- ☒ Send Menu Template
- ☒ Confirmed hardware arrived
- ☐ Complete Talech Online Curriculum
- ☐ [Complete Introduction Talech Training Course - Click Link for direct access](#)

SUCCESS Call ▾

- ☐ Input tax information
- ☐ [Complete Course pre-go live course training](#)

Takeaways

- Collaborate more to ~~help Batman save Gotham~~ empower customers and maximize retention
- Inspire confidence by mapping out a clear path to success
- Make it fun and give customers a sense of achievement

Questions?





Elly Easter


Account Executive

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