Customer Journeys: External Sharing to Reduce Churn

Agenda

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Account Executive

01 What we mean by collaboration

02 Why collaboration matters

03 How to leverage ChurnZero for stronger customer collaboration

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Strong collaboration leads to...

SPINS®

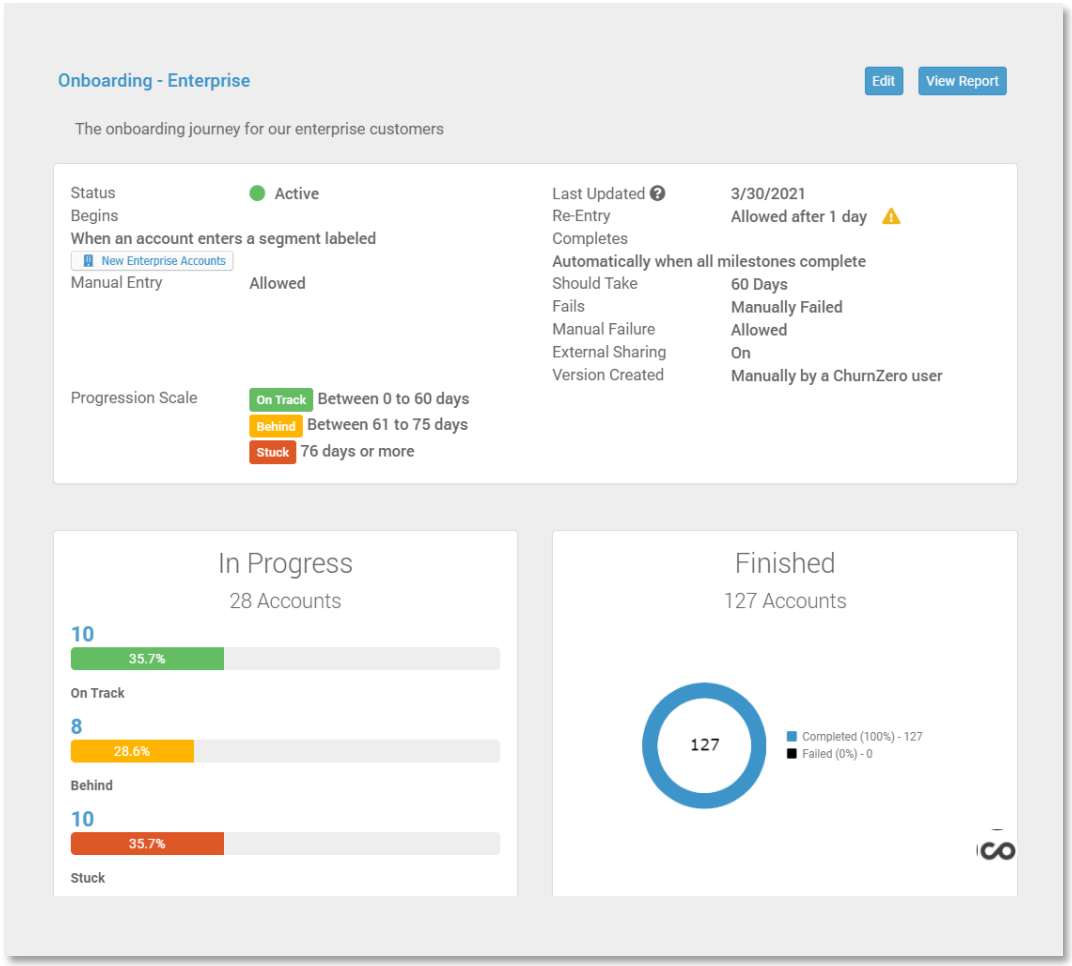
54% reduction
In at-risk
customer revenue

- **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**

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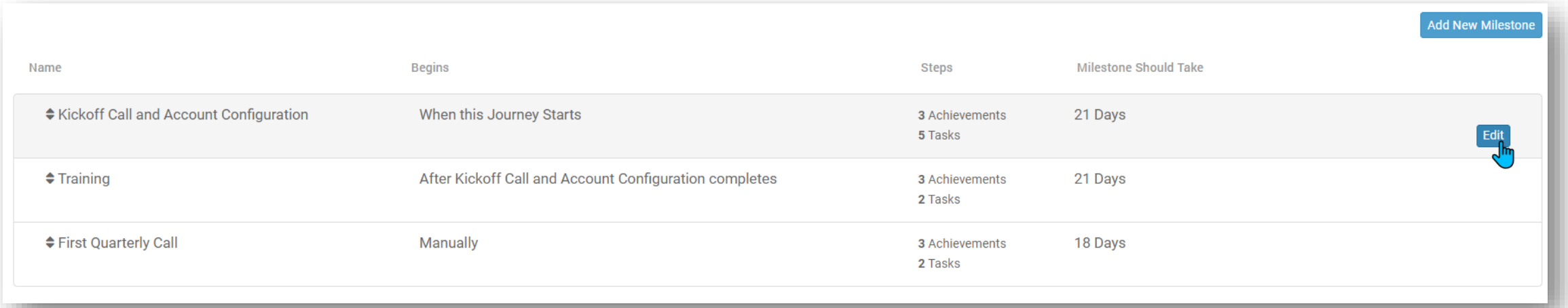
Break it Down Into Milestones

"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



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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*

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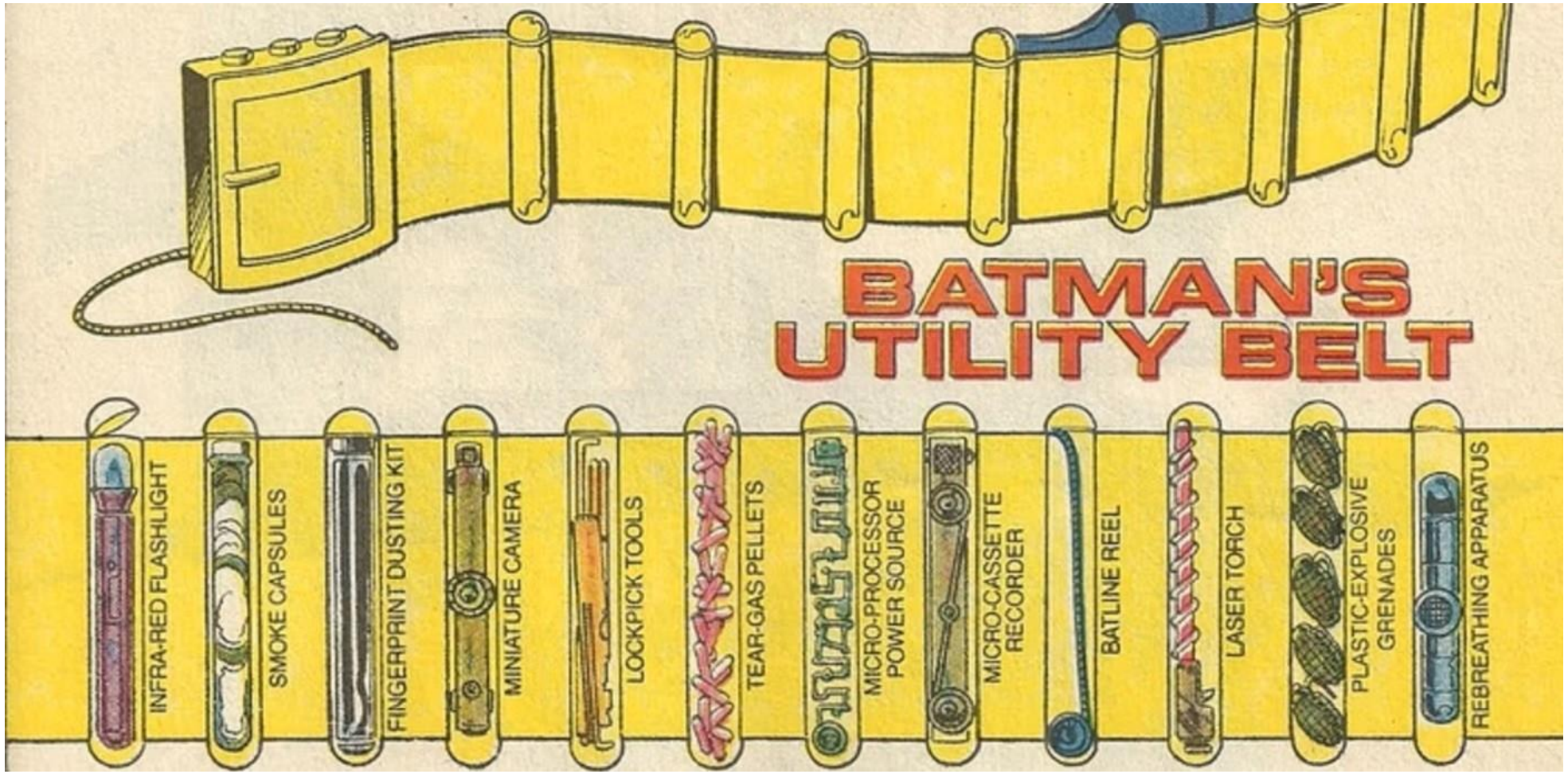
Let's Make Your Customer the Hero



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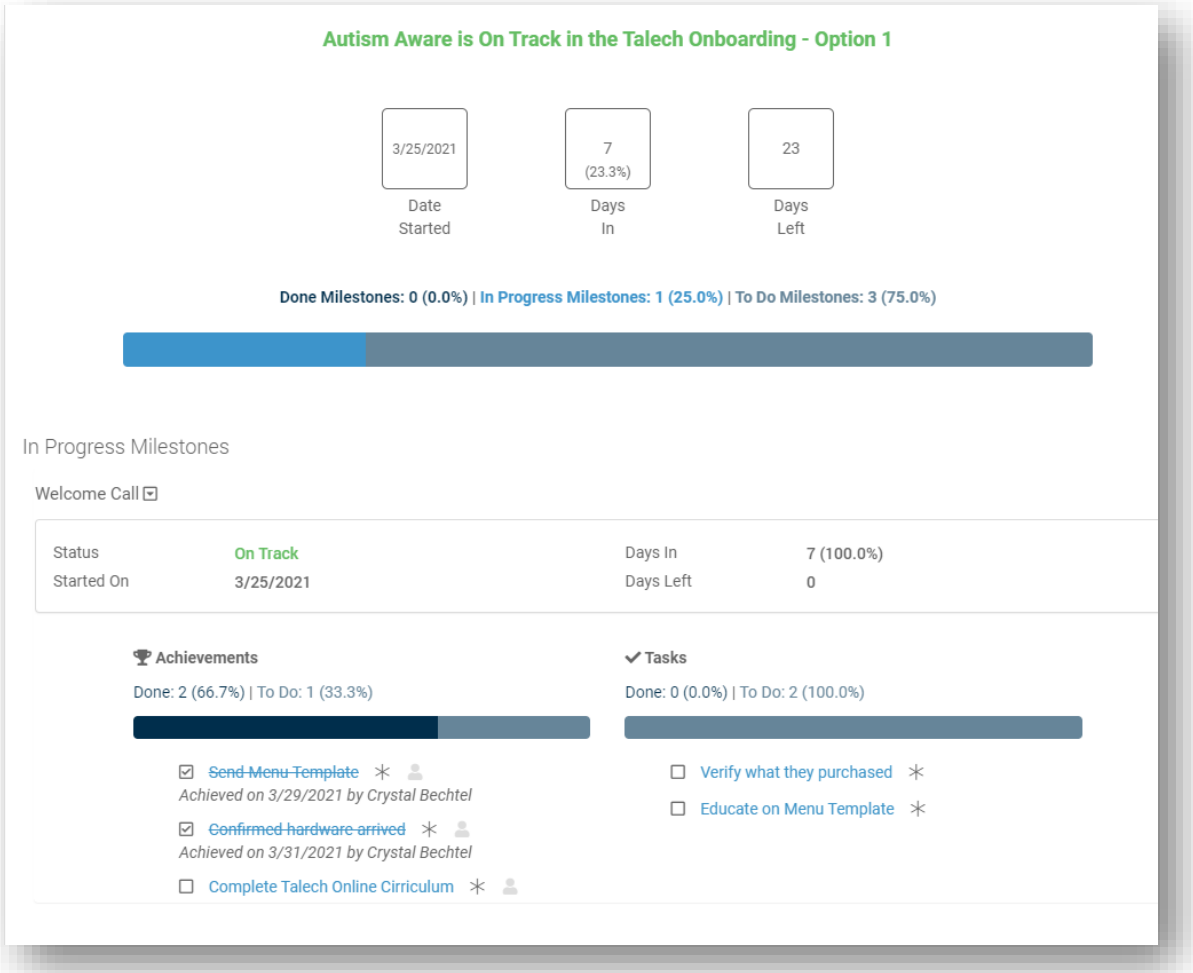
Get Customers Involved via External Journey Sharing



Inspire **confidence** by showing the path

Set clear expectations & timelines

Hold customers accountable

Encourage self-learning and adoption of tools

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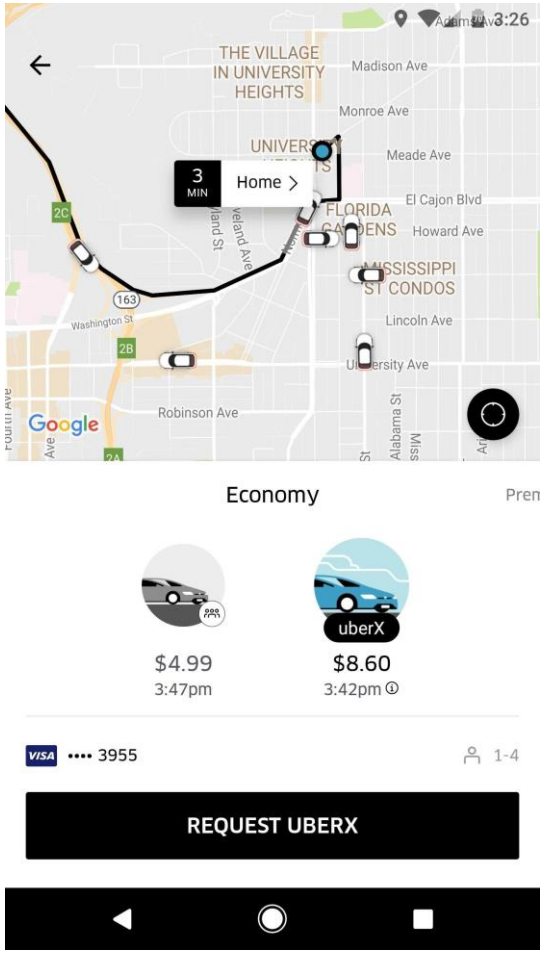
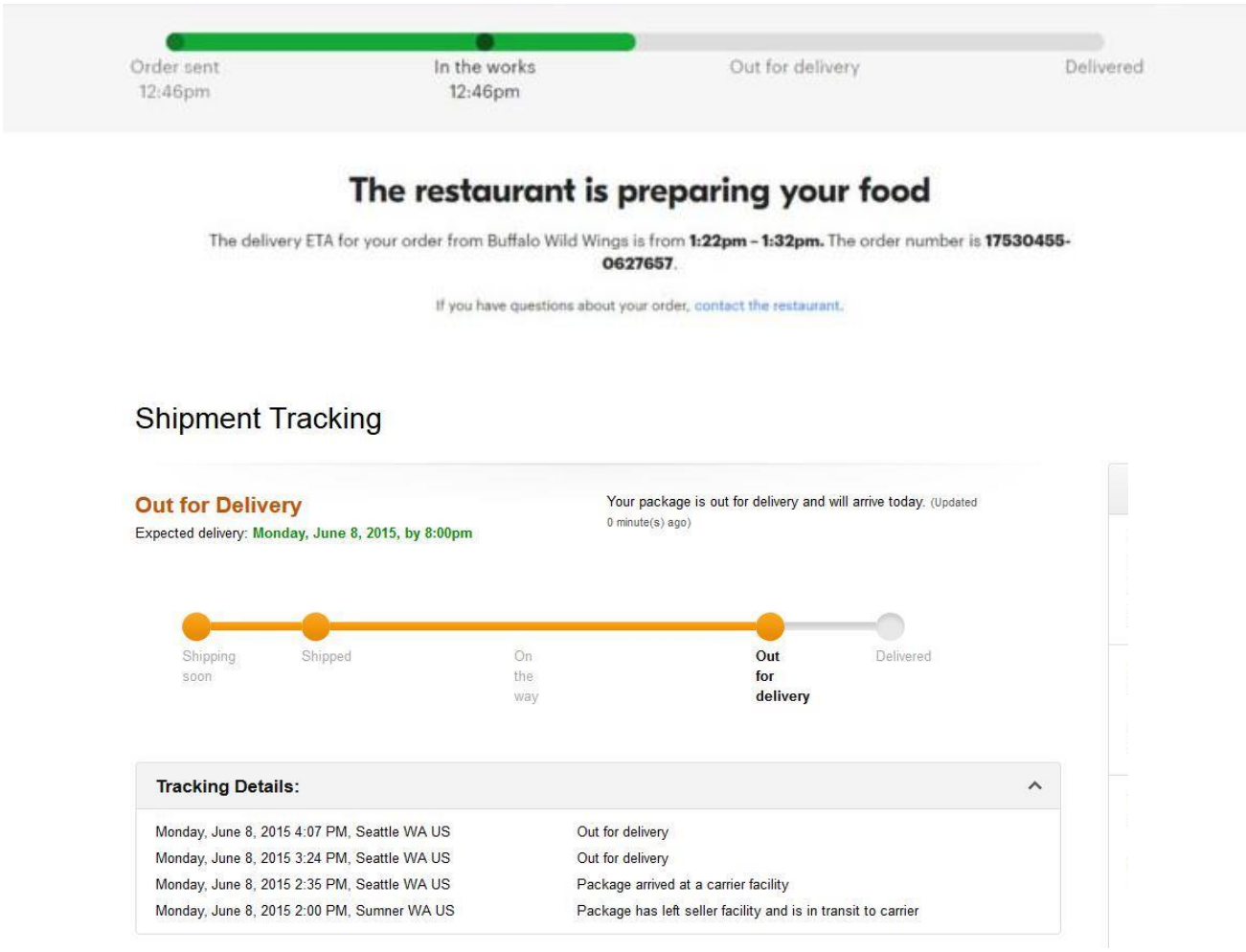
As consumers, we all love status insight





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

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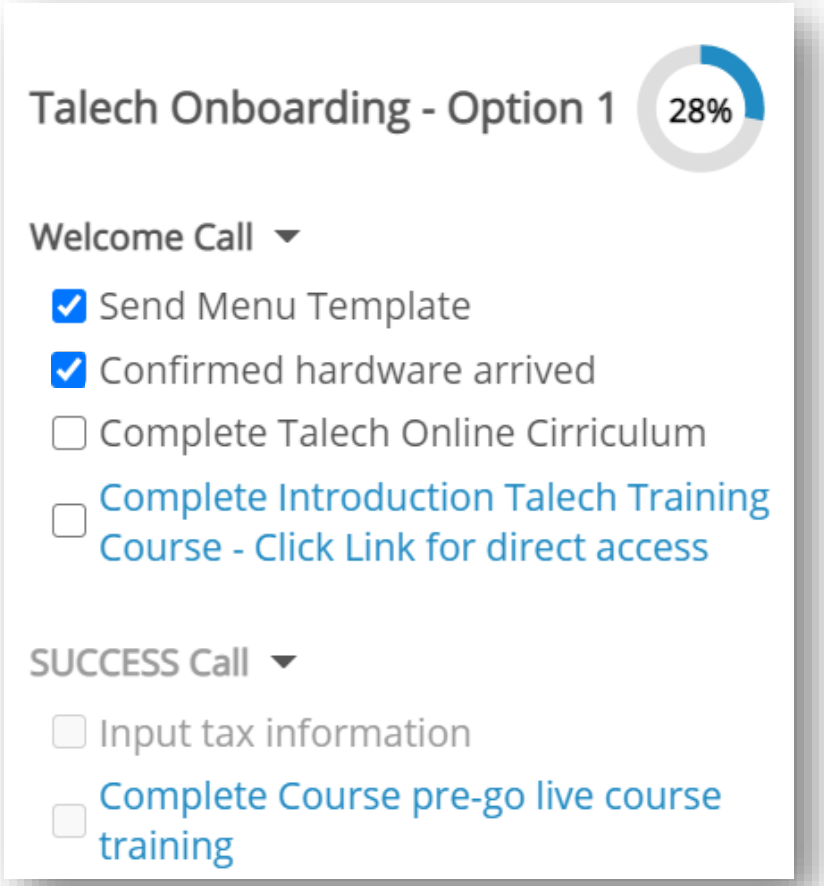
Make it Fun & Easy via In-App Checklists & Messages

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



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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

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Questions?

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