



# Customer Success AI™

The CS writing and strategy assistant

# Agenda



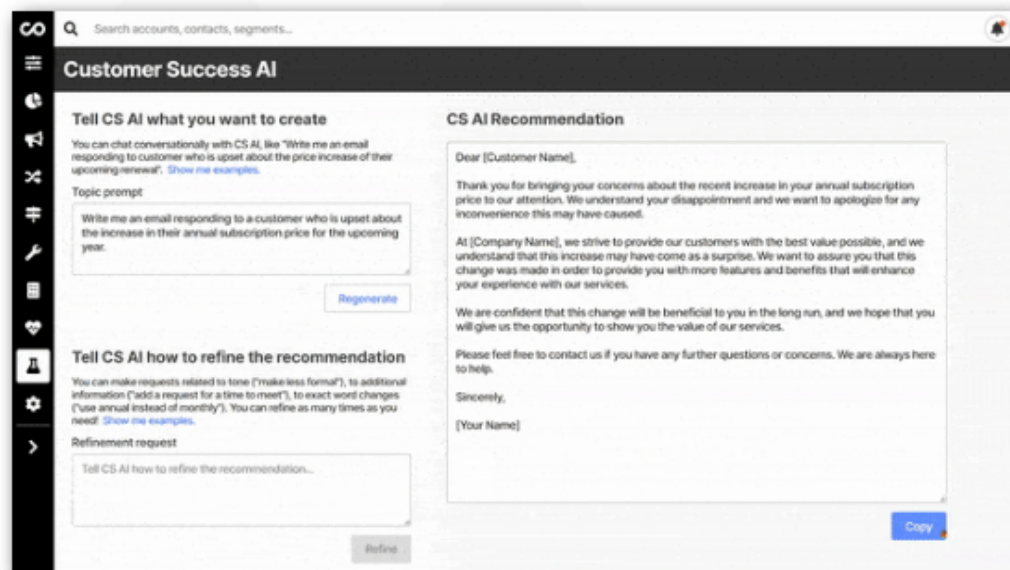
Ron Stephens  
Account Executive @ ChurnZero

**What is Customer Success AI™**

**Top 5 uses of CS AI™**

**Questions?**

# Let AI do the work for you: Try Customer Success AI™ for free



The screenshot shows the Customer Success AI interface. On the left, there's a sidebar with icons for search, chat, and other functions. The main area is divided into two sections. The top section, 'Tell CS AI what you want to create', contains a text input with a prompt: 'Write me an email responding to a customer who is upset about the price increase of their upcoming renewal'. Below the input is a 'Regenerate' button. The bottom section, 'Tell CS AI how to refine the recommendation', contains a text input with a prompt: 'Tell CS AI how to refine the recommendation...'. Below this input is a 'Refine' button. On the right, the 'CS AI Recommendation' section displays a generated email draft. The draft starts with 'Dear [Customer Name],', followed by a paragraph of text: 'Thank you for bringing your concerns about the recent increase in your annual subscription price to our attention. We understand your disappointment and we want to apologize for any inconvenience this may have caused.' This is followed by another paragraph: 'At [Company Name], we strive to provide our customers with the best value possible, and we understand that this increase may have come as a surprise. We want to assure you that this change was made in order to provide you with more features and benefits that will enhance your experience with our services.' The draft ends with a closing: 'We are confident that this change will be beneficial to you in the long run, and we hope that you will give us the opportunity to show you the value of our services. Please feel free to contact us if you have any further questions or concerns. We are always here to help. Sincerely, [Your Name]'. A 'Copy' button is located at the bottom right of the recommendation text.

ChurnZero's Customer Success AI™, or CS AI™ for short, uses generative AI to create content for Customer Success teams on demand. Just ask Customer Success AI for a new cadence of emails, a call script, or a list of strategy ideas, for example. Within seconds, you'll get a first draft to refine, customize and use.

CS AI is an industry first: the first generative artificial intelligence built for CS teams. More importantly, it's a new and valuable first step for you to take when it's time to create or brainstorm something new.

Get started for free today by completing this form.

Enter Email\*

☐ By checking this box, you consent to receive email communications from ChurnZero. You may unsubscribe from these communications at any time. For more information, check out our [Privacy Policy](#).

By clicking the Start Now button below, you acknowledge you have read and agree to [Terms of Use](#) that apply to your access to and use of CS AI.\*

Start Now

# Top 5 uses of Customer Success AI™

1. Email Content Generation
2. Customer and Market Research
3. Video/Phone Scripting
4. Strategy Ideation
5. Training



# Poll: Have you used generative AI before?

**Yes**

**No**

# Email Content

## Customer Success AI

### Tell CS AI what you want to create

You can chat conversationally with CS AI, like "Write me an email responding to customer who is upset about the price increase of their upcoming renewal". [Show me examples.](#)

#### Topic prompt

Reply to this email: Hi Ronald,  
Hope you are well :)  
I've just launched our first initial KPIs and we are getting customers live which is great, I think we need to have more of a ramp up before we can make best use out of ChurnZero!

[Regenerate](#)

### Tell CS AI how to refine the recommendation

You can make requests related to tone ("make less formal"), to additional information ("add a request for a time to meet"), to exact word changes ("use annual instead of monthly"). You can refine as many times as you need! [Show me examples.](#)

#### Refinement request

Tell CS AI how to refine the recommendation...

[Refine](#)

Recommendations may occasionally generate incorrect information, harmful instructions and/or biased content. Personally identifying information (PII) should not be included in prompts, refinements, or content.

### CS AI Recommendation

Great to hear that you have launched initial KPIs and that customers are now live. That is definitely something to be proud of. I definitely think that a ramp-up period would be beneficial to make the best use of ChurnZero. It is important to ensure that you have the right processes and systems in place to maximize the value that ChurnZero can offer.

Let me know if you would like me to help you come up with a plan for ramping up your use of ChurnZero.

Best,

[Copy](#)

# In Practice

## Prompt Examples

- Write an email to Jane at Acme to remind them that their renewal of [App Name] will be on July 15 for \$24,000. Offer to meet if they have questions.
- Suggest some strategies for responding to an email regarding cancellation of a software product due to budget constraints.
- Draft an email asking for a executive business review after a successful implementation. Offer them a link to schedule a meeting via this link: <https://calendly.com/XXX>
- Write an email welcoming a new point of contact for your account. Suggest a few ways to connect.
- Write an announcement congratulating Jane on achieving [X] adoption goal. Encourage her to now focus on achieving [Y] adoption goal.
- Write a response to an email requesting an escalation with your manager.
- Please refine this: [Include your own writing]

## Refinement Examples

- Provide a shorter version
- Make it more friendly / formal / funny
- Include the benefits of [your app; CS AI may actually know!]
- Remove references to [this]
- Add references to [this]
- Change [this word] to [that word]
- Spell/grammar check
- Write a version in [other language, please use with caution]





# Customer/Market Research

## Customer Success AI

### Tell CS AI what you want to create

You can chat conversationally with CS AI, like "Write me an email responding to customer who is upset about the price increase of their upcoming renewal". [Show me examples.](#)

Topic prompt

Tell Me about the company Higher Logic. Their Business Model, company values, and go to market strategy.

Regenerate

### Tell CS AI how to refine the recommendation

You can make requests related to tone ("make less formal"), to additional information ("add a request for a time to meet"), to exact word changes ("use annual instead of monthly"). You can refine as many times as you need! [Show me examples.](#)

Refinement request

Tell CS AI how to refine the recommendation...

Refine

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### CS AI Recommendation

Higher Logic is a cloud-based software company that specializes in providing customer engagement and community management solutions to businesses and organizations of all sizes. Founded in 2007, Higher Logic helps organizations to foster engagement and create meaningful connections between their members, customers and employees.

**Business Model:** Higher Logic offers a variety of engagement platforms, including an online community platform, an enterprise collaboration platform, a customer engagement platform, and a marketing automation platform. These platforms are designed to help organizations build relationships with their members and customers, create an engaging digital experience, and provide insights into customer behavior.

**Company Values:** Higher Logic is committed to providing innovative solutions that enable organizations to create meaningful connections with their members and customers. Their core values include focusing on customer success, delivering value, fostering innovation, and embracing change.

**Go-To-Market Strategy:** Higher Logic's go-to-market strategy is focused on helping organizations to create engaging digital experiences that enable them to build relationships with their members and customers. Their engagement platforms are designed to provide an effective and efficient way to foster engagement and create meaningful connections. Higher Logic offers a variety of services to help organizations to create a successful digital experience, including content strategy, design and development, user experience, and analytics.

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# In Practice

I'm about to meet with a customer and I have 250 other customers in my book.

- CS AI what do they do and what do they sell?
- A quick one stop search allows you come in and be a little more knowledgeable top of mind

DetailsCustom TablesContactsUsageTasksJourneysPlaysAlertsMessagesAttachmentsSurveysChumScoresReports

Account DetailsEdit

Product Edition	Gold	At Risk	False
Customer Sentiment	Green	CSM Sentiment Notes	
Sentiment Last Updated	12/19/2022	Industry	Computer Software/Gaming
Customer Type	Customer	Product A ChurnScore Category	Red
Product B ChurnScore Category	Green	Adjusted Forecasted Revenue	\$15,114.24
Product Dataset 1	Trial	Last Meeting Notes	they finally answered the phone, arranged another meeting, will follow up with them soon and check in to see their progress.
In business?	True	Logins last 30 days	3,161
Implementation Worksheet	<a href="https://marketingpony.us1app.churnzero.net/#/app/account/25191/details">https://marketingpony.us1app.churnzero.net/#/app/account/25191/details</a>	In Season	True
Churn and Contractions	24.99882908	Features Used	0
# of Current Champions	1	URL	www.google.com
CSM Sentiment			

Forecasting

Upsell Amount	\$15,000.00	MRR Start of Month	\$263.98
Forecast Probability	0.96	Email Credits Used	3,000
Email Credits Purchased	30,000	Percentage of Credits Used	10
Expansions and Upsells	\$26.15	Net Revenue Retention (NRR)	100.43
Current Sales Volume	\$590,936.49	Number of Projects	27
Project Effort	High	Project Impact	Medium

# Video/Phone Scripting

## Customer Success AI

### Tell CS AI what you want to create

You can chat conversationally with CS AI, like "Write me an email responding to customer who is upset about the price increase of their upcoming renewal". [Show me examples.](#)

#### Topic prompt

Write a script for a video message about the importance of having a consistent Account External ID to unify your customer data

[Regenerate](#)

### Tell CS AI how to refine the recommendation

You can make requests related to tone ("make less formal"), to additional information ("add a request for a time to meet"), to exact word changes ("use annual instead of monthly"). You can refine as many times as you need! [Show me examples.](#)

#### Refinement request

Tell CS AI how to refine the recommendation...

[Refine](#)

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### CS AI Recommendation

Hi everyone!

Today I want to talk about the importance of having a consistent Account External ID for your customer data. As you know, it's vital that you maintain accurate customer information in order to provide the best experience possible.

Having a consistent Account External ID allows you to unify your customer data and make it easier to access and use. It makes it easier to create custom reports and analyze customer behavior patterns. It also helps you identify and resolve discrepancies quickly.

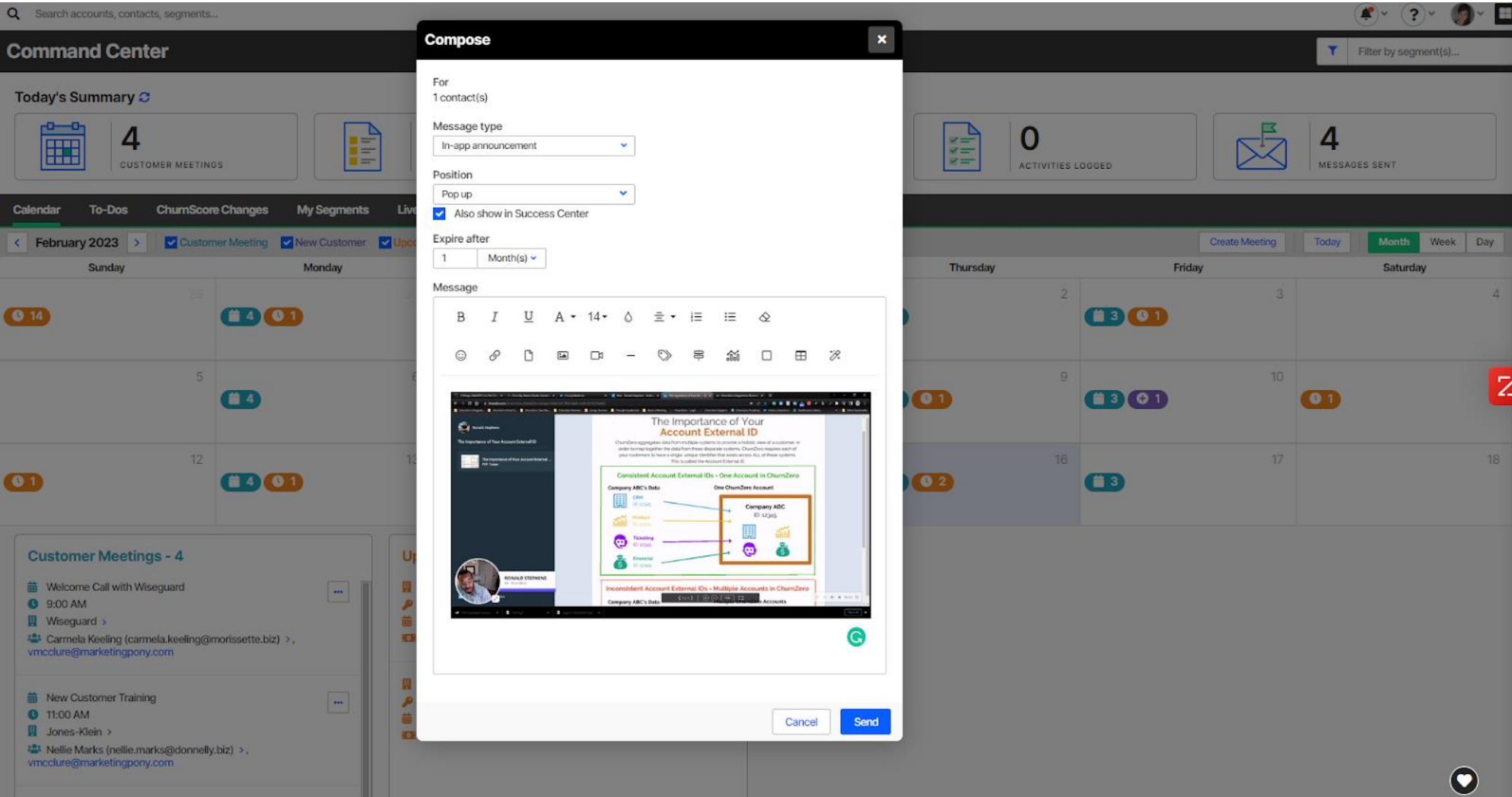
Having a consistent Account External ID also helps you to better recognize individual customers and provide them with personalized experiences. It also makes it easier to stay in touch with your customers and build strong relationships.

Overall, having a consistent Account External ID is essential for businesses that want to stay ahead of the competition and provide the best customer service possible. It's a great way to keep your customer data organized and up-to-date.

Thanks for listening and have a great day!

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# In Practice



# Strategy Ideation

## Customer Success AI

### Tell CS AI what you want to create

You can chat conversationally with CS AI, like "Write me an email responding to customer who is upset about the price increase of their upcoming renewal". [Show me examples.](#)

#### Topic prompt

Suggest some strategies for ChurnZero customers to adopt more features

[Regenerate](#)

### Tell CS AI how to refine the recommendation

You can make requests related to tone ("make less formal"), to additional information ("add a request for a time to meet"), to exact word changes ("use annual instead of monthly"). You can refine as many times as you need! [Show me examples.](#)

#### Refinement request

Tell CS AI how to refine the recommendation...

[Refine](#)

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### CS AI Recommendation

1. Create a series of tutorials or webinars to demonstrate how to use the different features and their value.
2. Offer free trials of advanced features to encourage customers to explore and adopt them.
3. Provide personalized onboarding that showcases the features that are most relevant to each customer.
4. Send out regular emails or notifications to customers highlighting new features and their benefits.
5. Offer rewards and discounts for customers who adopt more features.
6. Allow customers to give feedback on features and prioritize development based on customer demand.
7. Use machine learning and AI to suggest features based on a customer's usage patterns.

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# In Practice



# Training Content

## Customer Success AI

### Tell CS AI what you want to create

You can chat conversationally with CS AI, like "Write me an email responding to customer who is upset about the price increase of their upcoming renewal". [Show me examples.](#)

#### Topic prompt

Write a training script for ChurnZero Journey feature

Regenerate

### Tell CS AI how to refine the recommendation

You can make requests related to tone ("make less formal"), to additional information ("add a request for a time to meet"), to exact word changes ("use annual instead of monthly"). You can refine as many times as you need! [Show me examples.](#)

#### Refinement request

Tell CS AI how to refine the recommendation...

Refine

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### CS AI Recommendation

Welcome to the ChurnZero Journey feature training!

In this training, we will cover the basics of the ChurnZero Journey feature and how to use it to maximize customer retention.

First, let's start by understanding the concept of a customer journey. A customer journey is defined as the journey a customer takes from the moment they discover your product or service to the moment they become a loyal customer. This journey is made up of milestones or touchpoints that represent progress and engagement.

The ChurnZero Journey feature allows you to track, monitor, and analyze each milestone in a customer's journey. You can use it to identify potential churn risk, create campaigns to keep customers engaged, and measure the success of your customer retention efforts.

To get started with the ChurnZero Journey feature, you will need to set up your customer journey. This is done by creating milestones and determining the criteria for each milestone. For example, if you want to track a customer's onboarding process, you might create milestones for creating an account, completing a tutorial, and making a purchase.

Once your customer journey is set up, you can begin to track your customers' progress. The ChurnZero Journey feature will show you which milestones each customer has reached and which ones they still have to complete. You can also use this information to create campaigns to keep customers engaged and encourage them to complete the customer journey.

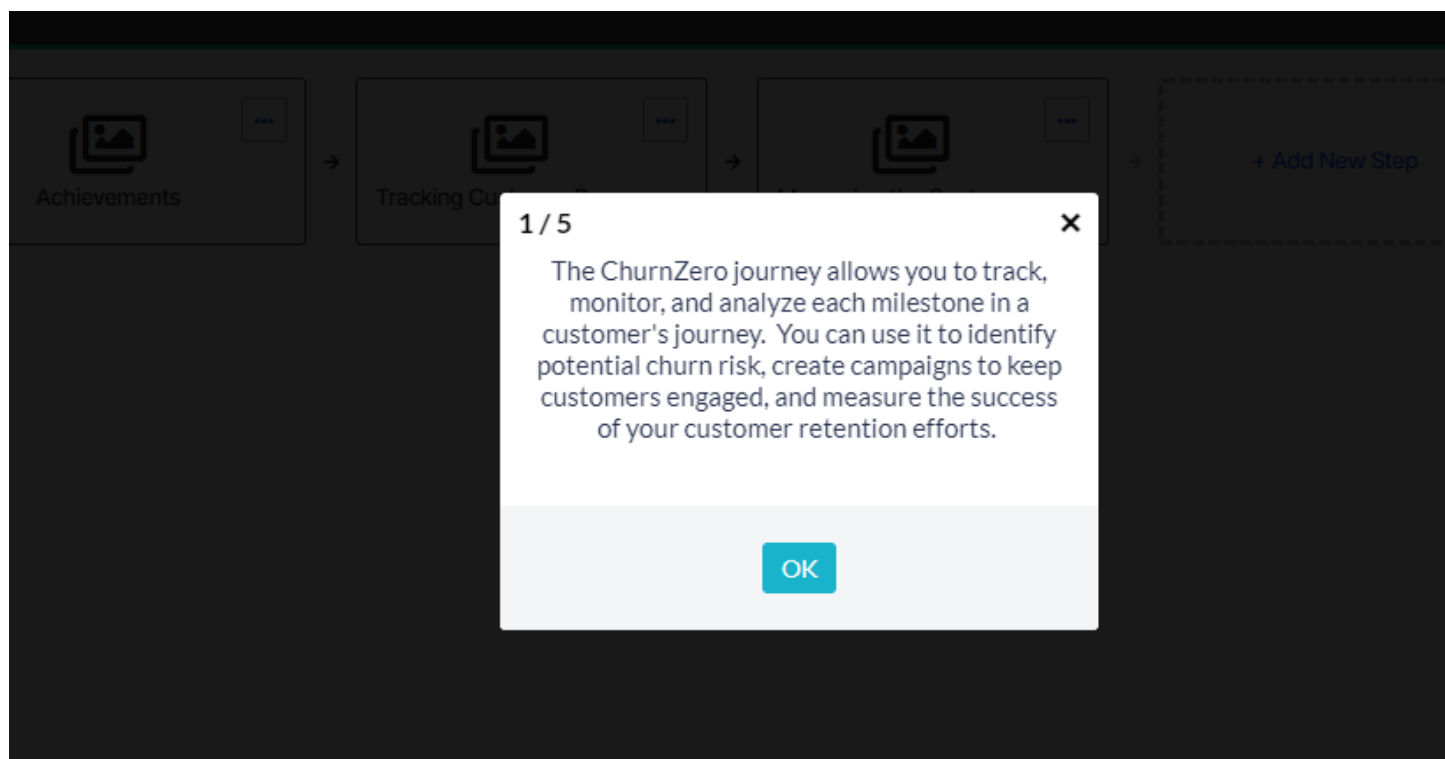
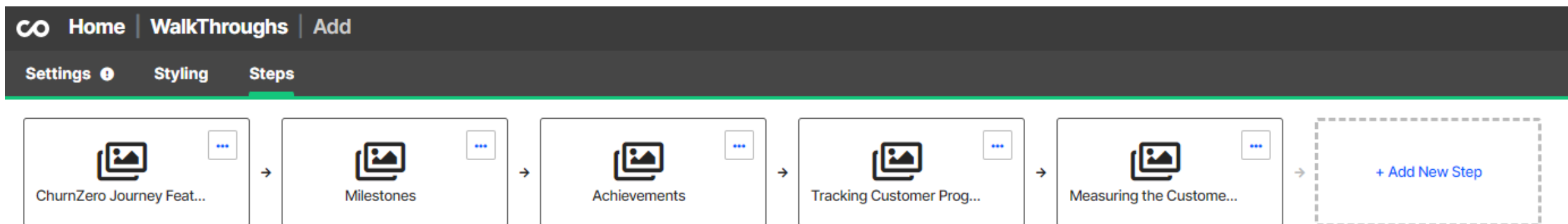
Finally, you can measure the success of your campaigns and customer retention efforts by analyzing the customer journey data. The ChurnZero Journey feature allows you to view customer journey metrics such as completion rate, average time to complete a journey, and customer churn rate.

We hope this training has given you a better understanding of the ChurnZero Journey feature and how to use it to maximize customer retention. Thanks for joining us today!

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# In Practice



# Summary

Generative AI uses for Customer Success

1. Email Content Generation
2. Customer and Market Research
3. Video/Phone Scripting
4. Strategy Ideation
5. Training

# Questions?



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