

High Touch & Low Touch Customer Engagement Strategies

With James Manning



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Account Executive

WHAT WE PLAN TO WALKTHROUGH

What are plays?

Why use plays?

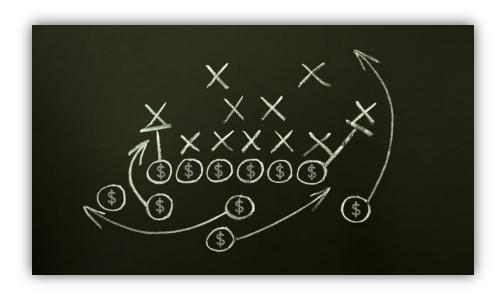
High touch vs. low touch

Low touch use cases

High touch use cases

What are Plays?

Repeatable actions that CSM's should take, and/or automated communications to customers that are triggered by specific, pre-defined situations





Examples of Plays

 New Customer Onboarded
 →
 Trigger Onboarding Play

 Account up for Renewal in 60 Days
 →
 Trigger Renewal Play

 Customer Successful with Feature X
 →
 Trigger Upsell Play for Feature Y

 User is Dormant Play
 →
 Trigger Re-Engagement



Why use Plays?



Bake best practices into CSM workflows



Drive advocacy



Save CSM's time



Boost adoption



Engage more customers at once



Be productive about major red flags



Poll:

Does your organization have documented or pre-defined playbooks and/or processes for CSM's?

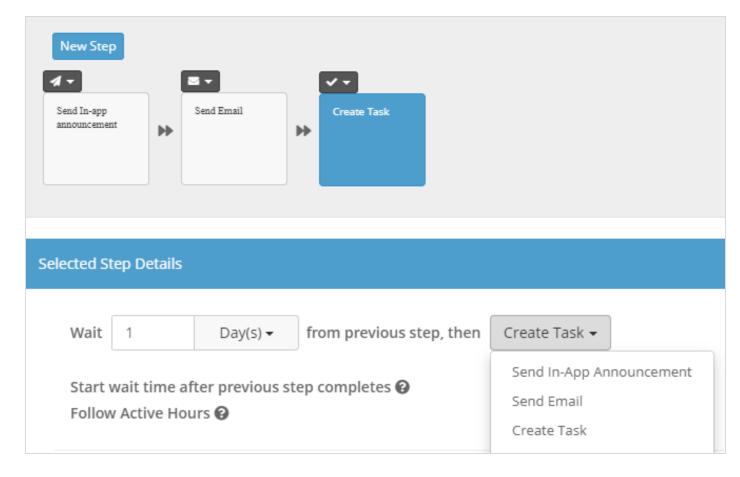


Actions Triggered By Plays

Send Email

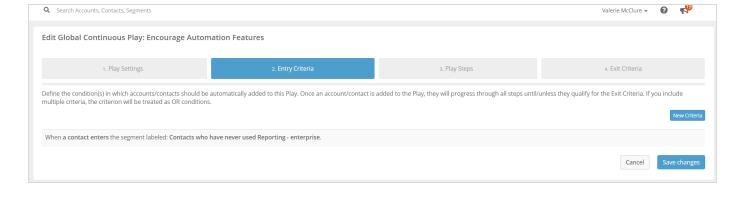
Send In-App Announcements

Create Task

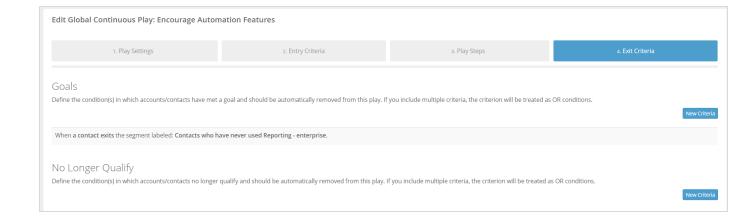




How to Build Plays



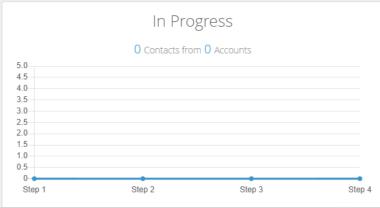




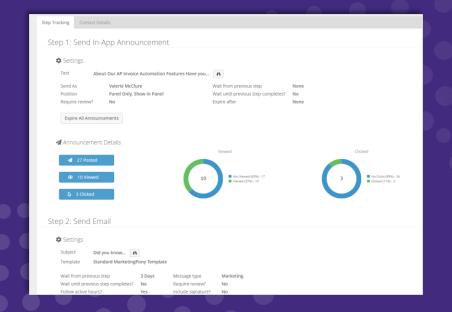


Track Success











High Touch vs. Low Touch

High Touch Medium Touch Long Onboarding Mid-Market ACV **Enterprise ACV** PER **ACCOUNT** High Touch Low Touch Semi-Technical **SMB ACV** Mid-Market ACV 100-250 accounts >250

CUSTOMER MARKETING

ACCOUNTS PER CSM



Poll:

How would you define your CS model?

HIGH TOUCH

MID TOUCH LOW TOUCH

COMBO

Low Touch: Boost Feature Adoption

Day 1: In-App Message

Day 3: Branded Email

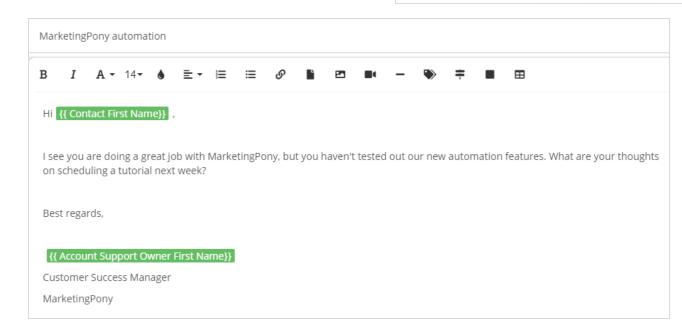
Day 6: CSM Email

Day 9: Phone Call

About Our AP Invoice Automation Features

Have you seen that our webinar about how to use our automation features is online? It's really great and, since you haven't used these features yet, we think you will find this video useful.







Low Touch: Automate the Lifecycle



Onboarding Renewals Expansion

Advocacy

8 CSMs Managing 15k SMBs



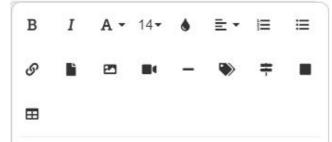
Low Touch: Expansion

Day 1: In-App Message

Day 3: Branded Email

Day 6: CSM Email

Day 9: Phone Call



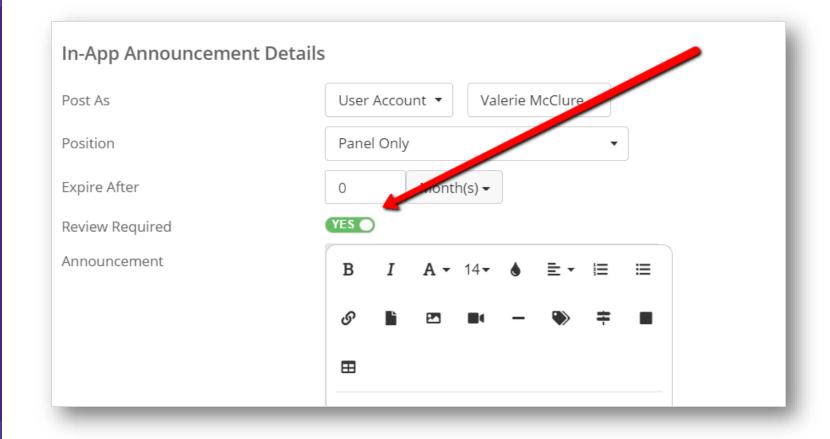
If you love MarketingPony, you'll love SalesPony!

SalesPony is our newest product and you cannot believe how well it works with MarketingPony.



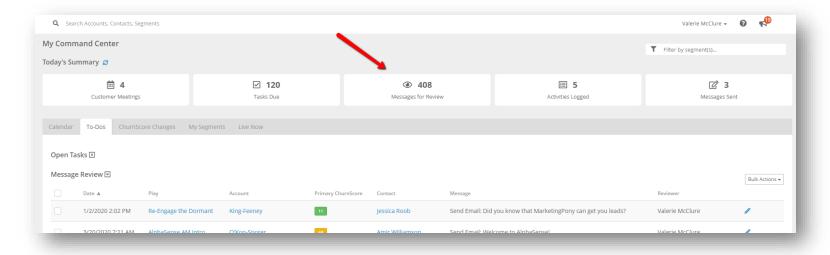
And for our Power Users, you get 25% off our best price. Use coupon code "POWERPONY".

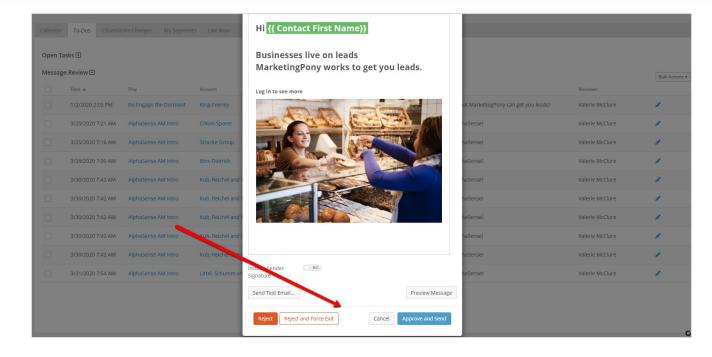
Make Low Touch Plays High Touch with Message Review





High Touch with Message Review







High Touch: Champion Leaves

Day 1: Task

Day 1: Email (Message Review On)

Day 3: Task (Phone and LinkedIn)

Day 7: Manager Email



Picking up the conversation

B I A $\overline{}$ 14 $\overline{}$ 6 $\overline{\underline{}}$ $\overline{\underline{}}$

Hi {{ Contact First Name}} ,

Congratulations again on the new role! Working with many of your new colleagues over the last [Insert timeframe] at {{ Account Name}}, I know how special of a place it is.

The partnership between Explorance and {{ Account Name}} has been very fruitful—how about setting up some time next week for an Executive Business Review to get up to speed on the results to date and what we plan on accomplishing this quarter?



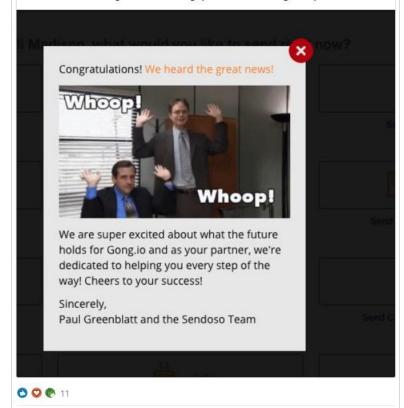
Bonus Use Case: Drive Advocacy with Creativity





Always impressed with the level of customer service/personalization shown by the **Sendoso** team!

When I just logged into my dashboard - had this GIF/message congratulating us on our recent funding round. Thanks guys, we love working with you!





Takeaways:

Low Touch: Automate and Escalate

High Touch: Personalize Messaging with Message Review

Be Creative and Stand Out





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Contact Us