

How to sell
**CUSTOMER SUCCESS
SOFTWARE** to the C-suite
with **13** common objections
and ways to overcome them



Have you been forced to inherit hand-me-down sales tools that weren't built with the Customer Success Manager (CSM) in mind?

In the age of the subscription economy, Customer Success (CS) teams are undergoing a painful growth spurt—maturing out of their ill-fit wears that never gave them the confidence to own their role in the customer relationship. If you rely on overloaded spreadsheets and hacked CRM substitutes to proactively manage CS, you're stunting your growth and squandering opportunities for better efficiencies, engagement, and evangelism.

But with competing internal focuses and budgets, sometimes your executive team won't immediately see the value of a new software tool. To convince them, you must understand their specific priorities and address their concerns head on. Use this resource to:

- **Create a compelling business case for CS software**
- **Overcome common leadership objections by arming yourself with justified responses**
- **Connect the dots and create a sense of urgency for this must-have purchase**

To start, here are some helpful tips to sell CS software to your internal stakeholders.



Seek to understand management's objectives.

When you understand their collective and individual goals, it will help you present a case that meets their felt needs.



Create a financial case that lines up with their objectives.

The key is to work backwards from the main objectives that your executive team cares about. If revenue is the main objective, make your case based on the platform's ability to reduce churn and surface expansion opportunities.



Discuss, don't present.

Ask questions to cultivate a shared understanding of what they are looking to achieve, and transition into how you'll meet those objectives with your new tool set.



Support your case with real-life case studies.

Do your due diligence and share vendor case studies that showcase their clients' customer success with tangible results. A few of our customer case study highlights include:

- **70% in user adoption** for SaaS EdTech company
- **5x ARR growth** for scaling SaaS non-profit organization
- **2x increase in customer lifetime value** for partnership marketing platform



Be ready if they say yes.

Have your high-level plan ready with an overview of the next steps, timeframes, and required resources.



Use our

FREE ROI CALCULATOR



to estimate the return that ChurnZero will provide with even a modest reduction in churn.

How to position CS software for each executive





Chief customer officer

CCO

Top concerns:

- Drive profitable customer behavior
- Create a customer-centric culture
- Increase customer retention
- Optimize the customer experience

Connect the dots:

Highlight how CS software standardizes processes to provide the optimal customer experience throughout each customer's journey.

Talk about how CS software eases the burden on the CS team and frees up their time to provide targeted one-on-one services to the appropriate customers with automation.

Rally support from the rest of the executive team, so the CCO perceives an investment in CS software as a low-risk decision. This will protect their credibility.



Chief executive officer

CEO

Top concerns:

- Increase company value
- Grow revenue
- Meet board/shareholder expectations
- Manage risk

Connect the dots:

- Show the impact of increasing retention on corporate valuation. (Did you know for every 1% increase in revenue retention, a SaaS company's **valuation increases by 12%** after five years?)
- Contextualize CS software as the key to account expansion growth.
- Position CS software as a solution to enhance CS effectiveness and scalability.
- Talk about how you'll gain predicted performance improvements from knowing the precise likelihood of customer renewals.



Chief marketing officer

CMO

Top concerns:

- Increase demand
- Drive customer referrals and references
- Connect data across channels
- Control branding and messaging
- Prove marketing's value

Connect the dots:

- Discuss plans to standardize post-sales communications based on the customer journey.
- Talk about how integrated NPS surveys surface customer advocates for new testimonials and case studies via automated workflows.
- Highlight how customer health scoring picks up where lead scoring leaves off to assess a customer's likelihood to renew.



Chief revenue officer

CRO

Top concerns:

- Make sales and revenue quota
- Build an accurate forecast
- Expand market share
- Beat the competition

Connect the dots:

Highlight how CS software drives account expansion by alerting the team to upsell and cross-sell opportunities based on usage and account triggers.

Discuss how CS software allows your staff to better serve the customer and optimize their experience which is a key differentiator and competitive edge.

Emphasize how a CS platform helps teams manage, analyze, and accurately forecast the growth of customer accounts. It provides a centralized repository for all renewal, upsell, and downsell insights that directly syncs with CRMs.



Chief financial officer

CFO

Top concerns:

- Manage expenses
- Contain risk
- Enable profitable growth
- Forecasting

Connect the dots:

- Present your CS software business case and an **estimate of its cumulative savings and ROI**.
- Talk about how CS software drives revenue growth by automatically identifying account expansion opportunities.
- Explain how CSMs can proactively fight churn and better manage their book of business with real-time alerts for customers at risk of not renewing.



Chief technology officer

CTO

Top concerns:

- Innovate the product
- Build a sustainable data infrastructure
- Procure scalable technology
- Protect and secure data

Connect the dots:

- Focus on how CS software takes the onus off the tech team to provide customer-facing teams with product usage data.
- Talk about how in-app surveys create a product feedback loop that drives the product roadmap.
- Stress how easy it is to integrate with your application via a simple JavaScript.

The cost of delaying

In short, there's never a perfect time to roll out new software or start a new project. Don't delay too long. You'll always be busy. The longer you wait to implement CS software, the longer you'll wait to see your improvement in customer retention and revenue growth.



Here are some common objections for why leadership may want to delay investing in CS software, and how you can overcome them.

1

“Why ChurnZero? As your CCO, I’m depending on your judgment; don’t make me look bad.”

ChurnZero is the proven market leader in CS software based on real customer reviews. ChurnZero has consistently been recognized for best software with G2 and TrustRadius since 2018.



“ChurnZero is truly a game changer for managing your customers at scale.”

See for yourself on [G2](#) and [TrustRadius](#).

ChurnZero is also differentiated by their flexible, nimble platform that is built for companies that are quickly scaling their CS teams and wanting to grow faster. There is not a steep learning curve and the software can be launched within weeks.

2

“Why can’t you use [Salesforce or other CRM]?”

CRMs were created to manage a sales pipeline, not a CSM’s workflow. CS software is focused on engagement and complex lifecycle management whereas CRMs were designed for opportunity management and uniform sales processes. And while CRMs allow for task setting and assignments, the automated task creation is usually limited to date ranges or might not be available at all. To follow up on relevant and actionable items, it’s important to be able to automatically set tasks on key data points like product usage or customer journey milestones, which you cannot do within a CRM. CS tool workstreams also combine data from external and internal platforms—not just manual sales inputs like a CRM—and use triggers based on health scores, NPS, and behavioral data.

There’s also the additional overhead and fragility of a custom CRM build to consider. For example, we must think about a scenario where the product champion who configured and maintained the system leaves. Is this the optimal long-term solution that will give us the flexibility to scale or pivot?

3

“What is the ROI of this project?”

It is **5-25x more expensive** to acquire a new customer than it is to keep a current one. ChurnZero customers experience a **3-5% retention improvement** in their first year, on average. Even a 1% retention improvement **can increase company valuation by 12%**

(Even at a **1% improvement rate**, ChurnZero customers see positive ROI in Year 1 and **ROI returns of +1,000%** by Year 3.)

4

“Our CS metrics (NPS, churn rate, CLTV) already look good.”

If we plan to grow, what works now, will not work in the future. We'll need to optimize operations and expand our CSMs' workload as we continue to onboard new customers while managing our existing accounts. CS excels when employees are proactive. We need to adapt the same mentality for our software tools and not wait until we've expanded CSM bandwidths to unsustainable and unmanageable extremes.

With a better understanding of our customers' product journey, we can pinpoint the exact milestone and usage threshold to offer our customers expansion opportunities. If we achieve more cross-sells and upsells in a shorter timeframe, we'll increase our Customer Lifetime Value (CLTV) and raise our expansion benchmarks.

5

“But we can hire more CSMs.”

Hiring more people won't solve for inefficient, repetitive operational processes—it will only compound them. Empowering our CSMs with automated tasks and customer outreach removes the administrative burden and redundancy from their daily work. This will allow them to refocus on the job aspects that can't be programmed and need a human touch, such as one-to-one consultations and relationship building, while giving them superhuman vigilance into customers' product usage and trends.

6

“We also have to manage cross-sells and upsells. Does this help customer expansion?”

CS software will give us no excuse to ever miss an expansion opportunity again. With real-time product usage data, CSMs can immediately identify upsells and cross-sells and have actionable insights to know who (user), what (product/service), when (real-time), where (in-app/email), and why (usage patterns) they should be reaching out. Knowing how our customers are using (or not using) our product is a primary factor in their likelihood to renew.

Additionally, it will improve our workflow efficiency which suffers due to customer data living in disparate systems. Scattered information makes it difficult and inexact to assess renewal probability and handle pre-call planning. CSMs also rely on their gut feel to rate a customer's probability of expanding due to disjointed, inaccurate, and non-standardized health scoring.

7

"It's marketing's job to automate customer communications."

The marketing team's resources are focused on lead generation—not customer engagement like onboarding, renewals, and other vital customer journeys that our performance is measured against. Additionally, our marketing automation software doesn't have the contextual data needed to drive hyper-targeted and relevant messaging to our customers. With ChurnZero, we can build sophisticated segments to power automated messaging based on data points like ChurnScores, customer milestones, NPS, and product usage data that can be drilled down to a customer's engagement with specific features.

8

"This sounds like a time-suck for our team to manage."

CS software will take significant weight off a CSM's workload. We currently lack the ability to send programmed alerts and personalized one-to-one customer messages. Everything from health checks to customer interactions are manual, time-intensive, and not scalable without hiring additional staff. By automating CS operations, CSMs can manage more accounts while giving them increased attention and value—making customers feel like they are a top priority all the time, not just at their contract renewal or after they encounter a problem. It's a win-win for the company and the customer.

9

"CSMs should already be regularly speaking to their customers to know how they're performing."

Customer feedback is a critical datapoint, but it's conveyed through a subjective, inexact, one-way channel: the customer's point of view. We don't rely on matters of opinion to gauge other areas of our business performance; why should this be any different? Relying on direct customer feedback without concrete usage data to verify their personal assessment provides an incomplete picture that's prone to misinterpretation. For example, it's misleading to attribute a positive health score solely based on a customer's self-reported happiness if their product usage is minimal to nonexistent. When words don't match actions, that can be a red flag for underlying issues.

10

How does this fit into our tech stack?

ChurnZero has over 60 integrations with CRM, support, usage, email, chat, finance, NPS, and SSO platforms. ChurnZero makes it easy to get a 360-degree customer view by bringing our separate systems and key customer data into one central place.

11

“Why is it so important to have our data in one place?”

CSMs are the main customer liaison to our internal departments—from product and finance to sales and support. As such, they need to have easy and instant insight into every customer touchpoint and interaction with our company. Disparate data can make us look disorganized and incompetent when CSMs misspeak regarding statuses and issues handled by other teams. We can break through the internal silos by bringing our customer data in a central hub to act as a single source of truth. The CRM isn't equipped to be used as a central repository since it's a sales tool that wasn't built to capture product usage data (one of the most telling indicators of a customer's renewal probability).

12

“How does having my tech team work on an internal project help our customer?”

A CS platform will allow CSMs to provide targeted, personalized, and timely customer outreach. With triggered alerts based on a customer's product usage, support tickets, customer milestones, and NPS, the CS team can engage the customer at the right time with the right message to proactively resolve pain points and forecast future needs with accuracy and confidence.

13

“The Dev team is too busy right now. I can't put resources against this.”

Implementation is very straightforward and typically takes dev teams less than a day to install the JavaScript. It's a light-touch project that's comparable to implementing Google Analytics website tracking—a method the most junior programmer can complete in minimal time. It's easy, lightweight, and won't interfere with our application's performance. If there's still a roadblock with development, ChurnZero has a feature called **DevLess** that will further minimize the amount of development time needed to instrument our usage events.

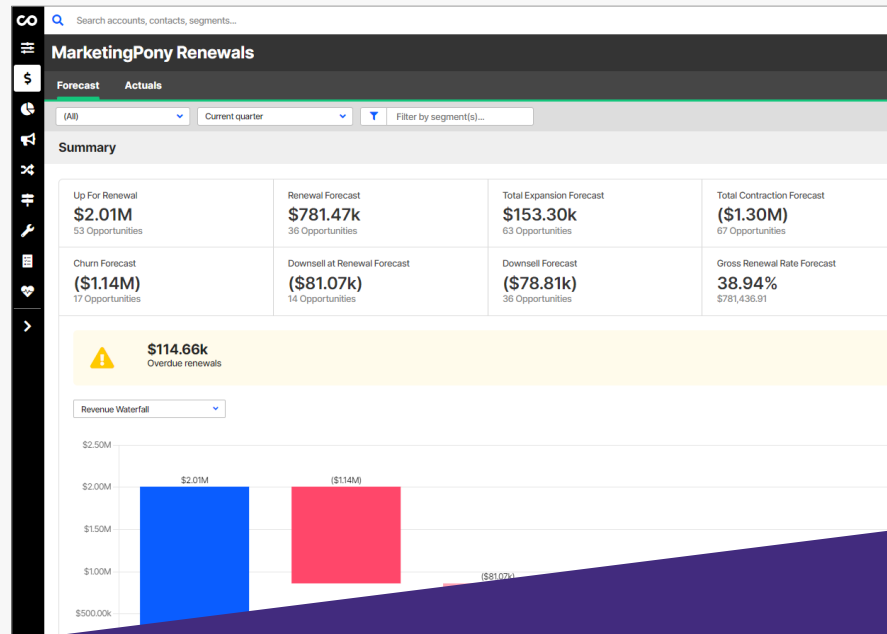
There are also long-term benefits for the dev team. CS will no longer need to pester the dev team for ad-hoc data dumps that are tedious and inefficient. By arming the CS team with real-time product usage data, we can improve customer retention and the adoption of the features your team creates.

Unlock your company's growth potential with a Customer Success platform

See how the ChurnZero Customer Success platform can help your business retain customers, expand current accounts, increase product software adoption, and optimize the customer experience.

Our team of account executives can show you how ChurnZero meets your company's specific needs to help you prove the power of a Customer Success platform.

[GET A DEMO](#)



About ChurnZero

ChurnZero is a recognized leader in Customer Success dedicated to helping subscription businesses succeed at scale. The company is known for its powerful, intuitive Customer Success platform and ongoing partnership with its customers to ensure they get everything they need to improve efficiency, increase revenue, and deliver the best possible customer experiences.

Through the platform, Customer Success teams can spot potential churn risks early and identify renewal and expansion opportunities. Best-in-class automation and in-app communication make it easy to engage with customers and lead them to value.

As Customer Success professionals serving Customer Success professionals, the ChurnZero team prides itself on being trusted partners, consultants, and coaches, so customers can focus on the work that matters to grow their businesses. Visit us at www.churnzero.com.

