**How to Create Personalized and Frictionless Customer Engagement**

Based on a conversation between Hunter Montgomery, the Chief Marketing Officer at ChurnZero, and Shashi Bellamkonda, the VP of Marketing at involve.ai.

You can listen to the whole conversation here.

The remarks below are Montgomery's.

**Is CS just for software companies?**

The customer success (CS) market is evolving and growing, and it's very exciting, especially for SaaS organizations. But many different types of businesses can employ CS strategies, which are focused on retaining the customers your sales and marketing teams have worked so hard to bring in by understanding the metrics and equipping everyone with the right building tools.

Too many businesses today don't treat customers the right way. They don't treat them individually, based on how they're doing, who they are, and where they are in their journeys.

We all know **i**t costs more to get a new customer than to retain an existing one. So, if you're not going to get new customers (like during the pandemic), you better not lose the ones you have. If you can convince customers there's still value in what you provide, they'll stick around.

One reason CS resonates with software companies is that the sales and marketing teams have lots of data on our customers, so we know who they are, what they're doing, how they're using our products, and what they're doing on social media and in searches.

**When the internet started, it was supposed to create an easy, seamless experience. Has that happened?**

It's improving as we produce more tools and ways to interact and engage with our customers. But, in some ways, it's become a disjointed or inconsistent experience. When you offer customers new channels to connect on, such as joining a community, opening a support ticket, or talking to them on social media, it gets harder to deliver that consistent experience. It's harder for customers to know who their CS contact is and to find the education, support, or content they're looking for.

Imagine coming onto a new platform and not knowing where to go or what resources are available. Or customers go to a site and have a great experience but go somewhere else on the site and have a different experience. It feels like a totally different company.

To alleviate that issue, at ChurnZero, we built a Success Center—a place customers can go to see who their CSM is, check their usage of the product, and find out if there's a course or additional information they can access. Some companies embed their public blog in their Success Center. From this centralized place, customers can go to the next step, such as your community or academy, but at least they know where to start.

But if they don't know how to get started, or they're not using the products they bought, when renewal time comes, they will pass.

**What are some other ways that companies can become frictionless?**

**1—Community**

A community is a great place, especially for software companies, because not only are customers engaging with you (make sure you have a community manager or someone from your team in there ), but they're also engaging with other customers. And you want other customers to be the source of a lot of information because there may be a specific use case or industry question that is better answered by someone who is doing the same thing or has the same experience or problem they're trying to solve.

### 2—Academy Learning

Academy learning is critical because that's where you can get your customers engaged. Learning how to use your product can be hard, and academy learning enables you to onboard them and walk them through the steps.

Ultimately it's about education, so you want them to learn efficiently, not with a minute-lecture series, but by offering different strategies.

Since customers can't advance in the onboarding process until they pass specific courses, we've made that part of our process, telling them, "okay, you passed that course, you're ready to go to the next one."

But there needs to be an agreement between you and your customers that says we're going to provide the best service support we can, but you need to commit to participate and do the things we think are necessary to be successful. And if you do not do these things, it will be much harder to succeed.

Since many customers have common questions, having the community active in the academy is a better way to reflect the voice of the customer.

### 3—Consistent Branding

Your brand experience should be the same everywhere, whether customers read your company blog or visit the community.

### 4—Success Center

If someone asks a question in the community, and they don't get a response, they're never going to go back. Having a Success Center lets them see their options, learn how to engage with the company, be more active in the community, read the blog, and learn about how they're using your product.

To get people engaged, you should give them as much information about their experience with you as possible, so there are no surprises. It all starts with creating a client relationship and building trust and credibility. This foundation is too often overlooked in the journey.

**5—Personalize the Experience**

Don't do things on a cadence that fits everyone. Personalize the experience for each customer, so you know which part of the adoption journey they're in. If you want some efficiencies, you can group companies that are relatively at the same place, such as being stuck onboarding.

Being more high touch doesn't mean you have to have a one-to-one personal interaction every time. But you want your customers to feel like that is what you're doing. And that goes back to the data. There are ways to communicate and move people along using automated tasks and communications that benefit your company and your customers because they don't want to waste time taking additional, unnecessary steps.

While there are many different ways you can get in front of your customers, connect with them how they want to be connected with. It may be through the Success Center, email, or a Slack channel. Make it a good experience for them—it's not about how you function. Don't try to fit everybody into a rigid set of processes.

**SaaS Companies Have Advantages**

SaaS companies have an advantage here because we know more about our customers' workflows, especially on the CS side. But we still don't know that much about our prospects. We can make them a persona, but we still don't quite know when they're ready to buy. We're getting better at it on the customer side using intent data. We know who the primary point of contact is, who the executive sponsor is, whom we need to talk to within the organization, how we need to talk to them, and what information they need.

We can build an experience that fits that. We won't send a daily usage report unless they ask for one. To be a little controversial, there is a use for quarterly business reviews, and they can be effective. But you should engage with your customers when you need to. If the customer is happy and the data shows they're using your product correctly and your NPS scores are positive, having a meeting for the sake of having a meeting isn't a good use of time.

Or, if they're not doing well, are you going to wait two months to engage with them? If usage is down, you want to tell them, "we think if you use this feature, you'd be very effective." In companies where the marketing team owns the customers, marketing may not even know there are unanswered support tickets, or the customer hasn't even

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From a CS perspective, you better know what stage the customers are in on their journeys and if things are good or bad before asking for a meeting. From all the data companies can collect about customers and the detailed profiles they can build, there should be very few surprises about whether they will renew.

**Does frictionless mean self-service, or is there a pathway in which people can engage?**

In today's world, people want to find the answer themselves without talking to another human.

That's frictionless, but is it right? Perhaps offer a concierge-like service that allows them to ask other people in your company questions.

Both frictionless and high-touch models can coexist. High-touch doesn't mean a process can't be automated or digital. You can still have digital communications with high-touch customers as long as they're relevant and feel personal.

For example, let's say a customer is close to renewal time, but they're still in training. That's the time to have a conversation, asking, "How can we help you see value in this?" or "What can we do to help?" That's where you can escalate things at a concierge level.

High-touch customers appreciate this because they want to feel that there is a relationship, and they're not just getting another check-the-box automated email that doesn't understand where they are.

**What are some of the most successful customer campaigns you've run to boost customer engagement and experience?**

Before launching the community, we started a community ambassador program. Customers agreed to be ambassadors and got a badge on their profiles. We wanted them to be the ones who first answered questions because customers want to feel like there's a larger community of users that may have more specific answers because they're in a similar situation or industry.

Another campaign that worked well was sending automated messages when we saw low usage of a product, tool, or feature. You can say, "This other customer used this feature, and look what their results were." We've seen a lot of value from that on the product adoption side.

It's about building a relationship with your customers so when they're a few months out from renewal, they've already seen the value of what you do, and you don't have to pitch them.

**How will customer engagement strategies change in the near future?**

We're already better on the data side in understanding what people use. Intent data is very big on the marketing side and can also be used on the CS side. For instance, we can see the signals if a customer is not happy and searching for a competitor. It's important to know this ahead of renewal, so you can have an early conversation, using the information to guide that discussion.

Having data helps you be predictive. All SaaS companies have the same playbook, use the same tools (like webinars), and talk to the same networks. But you have to be better and faster than everybody else. How can you differentiate yourself from your competitors?

The other great thing about working in the CS market is customer success people want to make their customers successful. It's not about solving one minor issue. They're more like coaches, helping customers out, trying to work through things. And now, we can give them the tools that make them effective.

**What strategies work for encouraging collaboration between marketing and CS?**

CS teams are our subject matter experts. CS managers are critical for our content—we ask them to write blogs and have them host webinars and virtual panels and attend local meetups we hold in different cities across the country.

We make CS managers part of our marketing because they need to be the face of the organization now that we're a CS platform. Before contacting a customer, I look them up to see what their churn score and sentiment are and may reach out to the CS manager to ask what they think.

Make CS managers part of your process. They have the best ideas, understand your product better than anybody else and understand how customers use it. They have relationships with customers, so it's often more effective to have them reach out versus sending a random email from a marketing person.

**For companies at the early stages of building customer education and CS programs, what should they prioritize to have the highest impact?**

Ask people on the team what they think.

Prioritizing education helps you determine what areas to focus on. Having a community is a very big lift. Everyone thinks it's easy—you just turn it on, and people show up. It's not. It's difficult. You need a critical mass of customers for it to work.

You can do some educational components early on, such as recording YouTube training sessions and sharing them.

**Is it a good idea for marketing and CS to meet periodically?**

Most CS success teams don't like not knowing when marketing emails customers. Having team meetings alleviates that.

At ChurnZero, our CS team handles all customer communications. That way, we don't over-communicate with our customers. They produce a monthly customer newsletter that we can promote things in.

In my opinion, customer marketing should probably sit in CS because the CS team knows more about what's happening. Then they can leverage us for help with content.

Embedding marketing teams within groups that need them is a good idea because those teams still need the skills marketers have, such as how to message, write, and talk about products.

**The Push for Being a Customer-Centric Company**

There's a trendy push right now to make customers the center of everything. It's easy to say but very hard to do right. You can over-commit to that. For example, if someone says we want to make customers the center of everything, then the CS team has no power and doesn't own the relationship.

You need to have an honest conversation within the organization about if you're going to be customer-centric, what does that mean, and how are you going to do it right?

Customers are the center at ChurnZero. The CS team owns that relationship; they own all the conversations, and we support them. They'll talk with the sales team about new criteria for selling to a customer. Or with the finance team to learn what metrics finance is looking for.

If everyone has a common understanding, it makes the customer-centric conversation a much more open one.