ARPEDIO

Client Case

Rethinking Customer Success and Sales: A Collaborative Powerhouse in the SaaS Industry

This client case highlights the importance of leveraging technology and having a strong Customer Success team to drive growth and reduce churn. With ARPEDIO's account-based selling solution, the Customer Success team in a SaaS company was able to better understand their clients' needs and pain points, offer tailored solutions, and coordinate more effectively with the sales team. This ultimately led to improved customer satisfaction and a more efficient and effective approach to customer success.

Discover how ARPEDIO provided a seamless all-in-one platform natively in Salesforce that enabled the company to quantify and visualize vital client information, and transformed their Customer Success and Sales departments into a collaborative force.

About this Case Study:
Due to pre-IPO considerations, the following case study has been anonymized to protect the identity of the company involved. The details and outcomes described represent a real-world business scenario but have been suitably disguised to maintain the privacy and integrity of the organization involved. While the specific organization remains undisclosed, the lessons learned and strategies employed can be valuable for companies operating in similar contexts to increase valuation towards an exit.

June 2023

Sector
SaaS Industry

Introduction

Despite its relatively short existence, the Customer Success team examined in this study has proven to be a transformative force, profoundly shaping the company's approach to customer support.

By recognizing the need for better understanding their clients' pain points and being able to offer tailored solutions, the team urged the importance of rethinking the company's customer support strategy. The team values data-driven insights highly and rely heavily on such. Therefore, they sought to improve their data visualization capabilities, with a particular focus on developing a health score that could help them assess the strength of their client relationships and forecast potential risks that needed to be dealt with in order to reduce the risk of churn.

On top of that, the Customer Success team wished to be able to coordinate with sales more efficiently and allow for a more proactive collaboration within the organization.

Challenges

The Customer Success team found themselves in a position where they on one hand were new to the business, bringing in a new perspective on how to handle clients, and on the other hand did not have the technology to fulfill all their (high) ambitions.

Key Challenges:

- The Customer Success team found themselves in a more or less reactive position, relying on sales to drive client interactions and meetings.
- The team relied heavily on Excel sheets to manage certain tasks and track customer health. They needed a solution that would enable them to use data to better understand their clients' pain points and be able to offer more tailored solutions.
- The team wanted to create a health score to assess their relationship with clients and set proactive objectives. However, their Excel sheets fell short when it came to this kind of software stack.

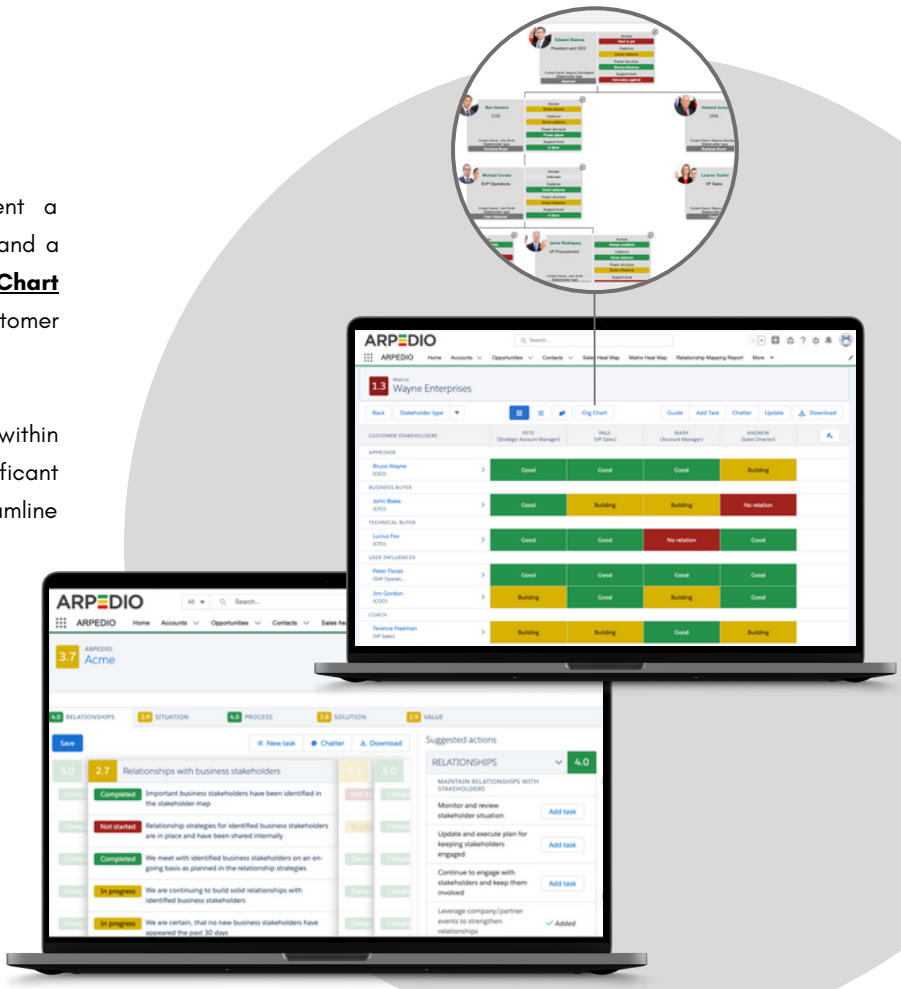
The Customer Success team struggled to find a tool that could meet the issues they were facing. More specifically, there was a need for a tool that could:

- Create a client health score that could also track changes over time.
- Forecast chance of renewal and risk of churn based on assessments.
- Assess client health based on their own customized best practices.
- Natively integrate with their Salesforce CRM to secure both adoption and access to all relevant client information within one system, as well as being able to combine the health score with other data points in the CRM.

Solution

ARPEDIO was able to provide and implement a combination of an **Account Management** tool and a **Relationship Mapping** tool (including the **Org Chart** component) that was customized to suit the Customer Success teams' specific needs.

The fact that ARPEDIO is integrated natively within Salesforce was an important feature and a significant benefit as it would both save time and streamline communication with sales.



salesforce appexchange 5.0 ★★★★★

Results

Going From Reactive to Proactive

Through ARPEDIO's platform, the Customer Success team shifted from a reactive to a proactive collaboration with sales. Overall, the most beneficial features that have been employed by the team are the health score and the org chart, which are utilized on a daily basis. The health score allows the team to quickly assess their performance and identify areas for improvement, as well as measure how these actions increase the chance of renewal, while the org chart helps them keep track of stakeholders and ensure they don't miss any important contacts between sales and customer success.

Streamlining the Assessment Process

ARPEDIO has become a crucial part of the Customer Success team's daily routine and has significantly improved their workflow, with several scalable results.

Instead of using Excel sheets and PowerPoint presentations, everything is centralized within Salesforce. The team have categorized their clients into high, medium, and low priority and use Salesforce dashboards to see where each client stands and who their assigned CSM is - all in one place.

78%
agree that...

...ARPEDIO's Relationship Mapping tool plays a crucial role in identifying relevant stakeholders and departments, empowering the successful upselling of strategic key accounts.

User Survey

Now the team no longer needs to copy-paste or populate different spreadsheets manually, saving the team valuable time and resources, while eliminating the need for unmanageable and time consumable Excel sheets completely.

The new automated process has streamlined the entire assessment process and being able to review the health score of their clients has been invaluable in both client interactions and internal client team assessments. The health score provides a quick assessment of a client's satisfaction and performance, which has been a significant time saver for the team.

"***Having the data visualized in this way, and the fact that the data in this case refers to the health score, that certainly helps me assess quicker - both in situations with clients, but also internally with my team. It helps me identify the performance of my team members, and helps in the reviews later on, so it's definitely a time saver***" - Vice President of Customer Success

A Priceless Integration

Several departments within the company, including Sales and Customer Success, now have access to relevant information that is related to their areas of responsibility. In addition, quarterly business reviews with clients who use both software and services are an important opportunity to discuss how things are going and identify areas for improvement. By having all the relevant information about the client's usage of the company's software and services in one place, the Customer Success team can provide more valuable insights and recommendations during these meetings. With this centralized information, whoever is running the review, whether internally or externally, can easily retrieve the necessary data, leading to efficient and productive discussions with clients.

"***Being able to have all this information in one place, and the fact that whoever is running the quarterly business review either internal or external is now able to harvest information quickly out of that, is priceless***" - Vice President of Customer Success.

...the implementation of ARPEDIO has resulted in a substantial increase in the availability of information across departments, and time spent searching for information has decreased.

User Survey

84%
agree that...

Enabling Invaluable Stakeholder Identification

80%
agree that...

...ARPEDIO plays a pivotal role in efficiently determining and assessing stakeholders, ensuring the identification of missing stakeholders, and facilitating the implementation of appropriate next best actions.

User Survey

Although Sales might potentially benefit the most from this functionality, the Customer Success team also adds information when interacting with clients during training sessions, including names and roles within specific teams. This information can then be amended to the org chart, creating extensions to it. The chart enables the Customer Success team to identify team members, ensuring that they have a point of contact for effective interaction - a feature that has proven to be invaluable for them.

Improved Collaboration Between Customer Success and Sales

After implementing ARPEDIO, the coordination between Customer Success and Sales has significantly improved. With the tool being used within Salesforce, everyone has access to a single point of reference for all client information. This has led to more productive weekly meetings between the two teams, as they can now spend their time discussing important client matters rather than just gathering information. Sales can see what Customer Success enters, and vice versa, leading to better coordination and collaboration between the two teams.

...ARPEDIO significantly improves the identification of relevant relevant pain points in the organization based on a best practice sales template.

User Survey

76%
agree that...

Conclusion

Overall, the implementation of ARPEDIO has had a significant impact on the company's Customer Success team. The health score and org chart features are utilized on a daily basis to assess client performance and identity potential issues, which have decreased the risk of clients churning. The team has also experienced unforeseen benefits, such as the ability to track the evolution of the health score over time.

Additionally, ARPEDIO has helped to streamline the team's workflow by allowing all communication and assessments to reside within Salesforce. This has improved coordination with the Sales team, as everyone now has a single point of reference and can focus on more important topics during weekly meetings.

In short, using the ARPEDIO Account-Based Selling technology:

- Helped the Customer Success team become more efficient in managing client health by streamlining the assessment process through the new health score.
- Helped forecast chances of renewals through the assessments.
- Made information easily accessible across departments in the company, reducing search time.
- Enabled effective stakeholder identification and assessment, optimizing actions for all identified stakeholders in deals.
- Improved internal collaboration between Customer Success and Sales.

All in all, ARPEDIO has provided the Customer Success team with valuable tools to improve their work and collaborate more effectively with the Sales team. The benefits have been significant and have become integrated into their daily routines, ensuring more efficient customer management. The result? A more engaged and satisfied customer base accompanied by a more data driven approach to accurately forecast renewals.

Any questions or reflections?

Sara Gynnerstedt
Account Manager

sara@arpedio.com
+45 31 52 94 63
linkedin.com/in/sara-gynnerstedt/

ARPEDIO

salesforce appexchange 5.0 ★★★★★