Gainsight

> **" *We used Gainsight CoPilot and over 200 customers turned on our voice feature within a week, which was incredible. That would have been 200 phone calls.* "**
>
> –**Lauren Denault,** Head of Customer Success, *Demandforce*

Demandforce®
Customer Success Hero

Demandforce scales its one-to-many touch to 30,000+ customers using Gainsight

At Demandforce's Success Showcase at Pulse 2016, a man stood up during the Q&A session. "Your CSM ratio is a thousand-to-one?" he asked, incredulous. "Is that what I'm hearing?" Demandforce's VP Client Services André Pimentel replied sardonically, "they're busy."

There's no one-size-fits-all model for Customer Success, and Demandforce is no exception. As a leader in providing marketing and communications software to more than 30,000 clients, Demandforce helps mostly local businesses connect to their communities and build strong online reputations. The company was founded in 2003 and has since gone through two major acquisitions, first by Intuit in 2012 and then again in 2016 by Internet Brands. It's still located in San Francisco, and has strong ties to the small business community there.

Demandforce's Customer Success team is currently made up of 27 CSMs after a recent reorganization. During this transition, the Customer Success team realized that many of its clients had been onboarded without one-on-one touch. They went through the gargantuan task of attempting an hour-long onboarding call with every customer in the base, and completed calls with half of them within six months. During that time, Demandforce temporarily allocated 54 employees from Sales and Support. Then, while implementing Gainsight, the team operated with 21 onboarding professionals and six CSMs.

"We as a company recognized that we'd grown so quickly and had so many customers that we couldn't support them in a one-on-one way anymore and we started to see some declines in our retention numbers."

CHALLENGE

In some business models, CSMs touch 50 clients max. In Demandforce's model, they have tens of thousands of low-touch, low-MRR clients. Without a one-to-many tool to orchestrate its communications efforts, Demandforce was relegated to being reactive instead of proactive as a CSM team needs to be. The ultimate goal was finding a software tool that prioritized who the team needed to reach out to and when, while keeping the rest of the plates spinning with automated one-to-many solutions.

"The main thing we wanted to try and figure out was how do we prioritize who we call? Who do we reach out to because we can't call everybody?"

SOLUTION

Demandforce implemented Gainsight on the tail-end of its reorganization. At the time the CSM team was heavily focused on completing the one-to-one onboarding surge. The end-goal was a robust one-to-many platform that automated touch with the majority of the customer base and flagged at-risk clients for one-to-one communication, and that means CoPilot. CoPilot enables Demandforce to communicate automatically with 30,000 customers in a way that feels personal.

Implementing CoPilot was job number one following the onboarding surge. It was only as Demandforce began building out its current team of 27 CSMs that they were able to begin monitoring customers' health using CTAs. Thanks to Gainsight, Demandforce can now set up Calls-to-Action that trigger CSMs into action for at-risk customers. Finally, the Customer Success organization leverages Customer360 to centralize its customer data in one conveniently centralized place.

RESULTS

"Customers are feeling like we're spending more time paying attention to their account. That feeling is helpful for retention as well."

CoPilot enables one-to-many attention with a one-to-one feel
The biggest draw to Gainsight for Demandforce was CoPilot, and so far, that's been a huge driver of value for the company. The Customer Success team regularly uses it to collect NPS scores at three and nine months during the first year and then annually after that. CoPilot has the ability to create automatic CTAs based on positive, neutral, or negative scores. Demandforce uses it to instantly turn positive NPS into advocacy and just as quickly respond to negative NPS by alerting a CSM.

For Demandforce, adoption of new features of the product is a critical indicator of future success. In the past, CSMs would have to personally reach out to hundreds of clients to see the same results as they do now with CoPilot automation. While rolling out a new paid feature called Email Finder, Demandforce used CoPilot to reach out to 8,000 accounts. 395 of them turned it on, resulting in 126,000 emails redeemed -- a very significant number that brought in $6,500 in revenue. A campaign for another feature was sent out to 1,000 customers and resulted in 200 of them turning it on.

Anecdotally, Demandforce continues to receive positive feedback from customers on the level of personal touch CoPilot enables. It lets you create personal emails that can be sent out one-to-many, signed and delivered by a CSMs own email address. One customer called her CSM saying she had been about to cancel her account. That's when she got an email through CoPilot. The client said that she hadn't realized how much attention Demandforce was giving her business. In the end, she didn't churn.

"People underestimate how difficult it would be to get information out of their product. But without the data, how the hell do you know what's going on with your product?"

Creating actionable CTAs and holistic Health Scorecards
Demandforce has found the CTAs generated through Gainsight to be so valuable, it built its entire Customer Success strategy around them. Instead of evaluating a customer's health based purely on usage metrics, Demandforce measures health in terms of how many CTAs are open for the client. On top of that, CSMs track Readiness, Support Cases, Sentiment, and a Subjective scorecard influenced by the CSMs evaluation of the client. Together, these metrics form a holistic scorecard for each client that can also be tracked historically.

CTAs are mostly usage-based: if a customer has features turned off or has unused features, a Call-to-Action is issued to a CSM. The key is that it's an actionable notification. The CSM has a very clear next step. It all starts with an IPD (In-Product Discovery). If that doesn't result in adoption, CoPilot issues an automated touch to the client. If they still don't respond, a CSM gets a CTA to reach out with personal touch. It's become an extremely effective solution to Demandforce's need to prioritize CSMs' limited time and reach among so many customers. According to André Pimentel, Demandforce is "starting to see a tremendous impact on the retention number."

"I love Gainsight because it ties together so much different data we have, and it does it in an easy-to-use way."

Customer360 optimizes efficiency by putting all the data in one place
From an operations perspective, every minute spent switching between tabs and hunting for the information you need is a minute you could be spending with the customer. When you're a CSM managing as many as 1,500 clients, those minutes add up fast. Customer360 allows Demandforce CSMs to stay within Gainsight and see every point of data that relates to their day-to-day workload. In the past, researching accounts used to take significantly longer, adding to prep time before calls and wasting hours of cumulative efficiency.

If all C360 was capable of was giving back CSMs huge chunks of time through convenience, Scott Superko would say it's worth it. But he plans on taking advantage of the tool's strategic planning functionality to build out Success Plans for each client. "I think they'll be huge," he said, "and easy to implement." Success Plans will be an important part of meeting Demandforce's goal of increasing retention this year. "Since implementing Gainsight, we have seen improvements in our Net Retention Rate" Lauren said, "and we would like to monitor these increases and continue improvement."