Key Themes

➢ Understand your market and your engagement strategy

➢ Customer Application as an active participant in Customer success (IoT)

➢ Scale through layering communication mechanisms dependent on consumption tracking action
Engagement Strategy

What do your customers look like?

Market Segmentation

SMB

Mid-Market

Enterprise

Funding Mechanism

G&A Funded

Paid Service Package

Approach

Automated communication for scale

Allows for more white glove staffing

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Scaling Happens at the Process Level

Proactive Lifecycle
- Onboarding
- Projects
- Customer Value
- Renewal Management

Account Relations
- Late/Declined Payments
- Pay Now
- Contact Updates

Resources
- Academy
- Support
- Knowledge Base

Reactive Events
- User Disengagement
- +/- Alerts
- Offers

Transaction Management
- Renewal MGT
- Buy Now

HubSpot In Portal
Empower Customers through Layered Communication

Understand Your Communication Landscape

What types of communication are available to you? Do they fit your engagement strategy?

Manually sent email
Manually dialed phone calls
Automated Email
Snail Mail

In application message center
A customer portal
Auto dial phone calls
Text

...
Some workflows call for a simple notification

Some require Consumption or Action

Designing Workflow

Leverage Consumption and Action

Email Opened?

Customer Portal Message opened?

Was the bill paid? Did usage change?
Mapping a Successful Path

Start Small - Choose a single process

Map the process as it is today

Determine Communication Method(s)
Do you need to progress to resolution?

Select a workflow tool – Gainsight tools?

Get consumption / resolution information into the database used by the workflow tool

Build your flows
Before Alert - Product Disengagement - Manual Process

Alert automatically generated w/relevant info.

CSM/CC reviews Alert and follows Playbook to frame Customer outreach

PRODUCT DISENGAGEMENT SCENARIOS
Steps to Product Reengagement

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Remediation Playbook</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your POG is disengaged</td>
<td>PLAYBOOK</td>
</tr>
<tr>
<td>Your customer is using a competitor</td>
<td>PLAYBOOK</td>
</tr>
<tr>
<td>Your customer’s partner/external resource is disengaged</td>
<td>PLAYBOOK</td>
</tr>
<tr>
<td>Your customer’s sponsor is disengaged</td>
<td>PLAYBOOK</td>
</tr>
<tr>
<td>Your customer had a short-term use case within the product</td>
<td>PLAYBOOK</td>
</tr>
<tr>
<td>Your customer experienced a product or service issue</td>
<td>PLAYBOOK</td>
</tr>
</tbody>
</table>

CSM/CC manually assesses and closes out Alert

Manual Email
Phone Call

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After Alert - Product Disengagement - Communicate in Portal

HubSpot initiates w/Customer on drops in product usage and presents actionable next steps

Consumption Tracking Across All Communication Layers
Before | Alert - New User Added - Manual Process

Customer adds a New User in HubSpot Portal

Automated email sent to Customers
Alert - New User Added - Automated Process

HubSpot initiates with New User in portal and provides actionable next steps

Alert! - Welcome to HubSpot! Let’s get you optimizing HubSpot and learning about all that HubSpot has to offer.

- Thanks, but I’m already a HubSpot Pro.
- Help me get Started
- Schedule Call w/ Value Specialist

Automated Email

Phone call