

“From the week we implemented CoPilot to today, across the board -- from high-touch to low-touch -- all of our adoption metrics went up. CSMs have more time to dedicate to doing what they do best: helping customers extract value from the product.”

—Julia Perry, Director of Customer Success, TigerText



TigerText increases efficiency by 8.25% using Gainsight CoPilot to save 3.3 hours per CSM per week

Tell me if this sounds familiar to you: each week you start off by collecting data from your product, from your CSMs, from Salesforce or any other sources you track. If your company is anything like TigerText, that might take you an hour or more. Then comes the fun part. Once you have the data, you spend the next seven or eight hours formatting it into useful scorecards and computing summary metrics.

Depending on how you measure and analyze data at your company, you might be painfully acquainted with a procedure like this. It may be functional enough when you have 10-20 customers, but it's still a headache. When you have more than a hundred, it's simply untenable. TigerText's Director of Customer Success Julia Perry knew all along that this piecemeal, DIY solution wouldn't work as the company grew rapidly. "We recognized pretty early on," she said, "that that combination of tools was unsustainable and unscalable in the long run."

TigerText was founded in Los Angeles in 2010, and has since grown into the healthcare industry's most widely-adopted secure messaging platform. As healthcare providers adapt unevenly to the Digital Era, TigerText is helping hospitals and other health services communicate efficiently while protecting patients' most private information. In November of last year, the company announced its Series C funding round of \$50 million.

At TigerText, Customer Success is one of three post-sales teams, led by the Director of Customer Success who reports directly to the CEO. The Customer Success organization kicked off in 2014. Within Customer Success, there are two functions: CSMs and Customer Programs & Operations. At a high level, four Customer Success Directors are responsible for the highest touch, most complex accounts. A team consisting of one Senior Customer Success Manager (CSM) and two CSMs work in support of other high-touch customers. Another Senior CSM is responsible for a hybrid model of high- and low-touch within large MSA accounts, and finally, one CSM supports all low-touch and tech touch accounts.

“Our CSMs were wasting a lot of time sending emails rather than focusing on strategy sessions, or training, or tactics that we know move the dial in terms of getting our metrics up.”

CHALLENGE

TigerText was growing rapidly, but like many growing companies, they were adapting tools for use in Customer Success management that weren't meant to scale. To track customer health, the operations team spent hours manually updating an Excel spreadsheet. To reach out to hundreds

of customers with thousands of end users, they were spending hours each week sending one-to-one emails or relying on impersonal one-to-many blasts sent through Marketing. There was no system to create, implement, or track the use of best practices amongst the CSM team. TigerText's client base includes some very large, extremely complex accounts as well as hundreds of smaller ones. "I needed a 360-degree view of each customer," said Julia Perry, "and a 30,000-foot view of the customer pool."

"I love that everything goes into this continuous improvement environment: we surface best practices. We embed those best practices in our workflow. We measure the success of them, and we do all of that inside Gainsight."

SOLUTION

TigerText implemented Gainsight and immediately got to work on integrating product usage data and Salesforce data into Customer Health Scorecards and the Customer 360 dashboard. They kissed the spreadsheet goodbye, and now have access to all of their data in one streamlined, centralized interface. TigerText focuses heavily on adoption metrics. They look at leading indicators of the percentage of active users over a given period of time for each account. Readiness to deploy TigerText features, severity of open Support tickets, Product issues, and management roadblocks are all viewable in Gainsight Scorecards.

CoPilot allows TigerText to send personalized one-to-many emails to customers and end users. Through CoPilot, the Customer Success team sends an average of two emails per week. They send personal touches on behalf of CSMs; replies go directly into the CSM's inbox. Nurture campaigns are also run through CoPilot, as well as NPS and NPS follow-up. TigerText also has several CTAs in place, including automated touches at implementation and renewal, as well as NPS through CoPilot annually and for new customers.

RESULTS

"Rather than spending time on administrative tasks like emailing a hundred customers about an important new feature or event, CoPilot is automating that burden. Now the CSMs spend that time with the customer."

CSMs save hours of time each week through CoPilot automation

How would you like CSMs on your team to have an extra three-to-four hours each week? In total, the CSM team was burning 26 hours and 15 minutes per week on average just sending and following up on emails promoting events and initiatives. With Gainsight CoPilot, the team has

cut it down to 6 hours and 5 minutes. That's in addition to the 4 hours and 20 minutes Customer Programs saves by switching to automated dashboards from Excel. TigerText's CSMs aren't wasting that impressive gain in efficiency; they're using the extra time they have each week to connect with customers personally, improve adoption, and become proactive instead of reactive. This extra effort CSMs have been able to put towards client consultation and improvements has led to an increase in Weekly Active Users and Total Messaging Volume.

"We've documented greater adoption of more complex, advanced TigerText features among our low-touch customer base because our low-touch CSMs are now able to engage with this customer pool. Without CoPilot, we never could have scaled in this way."

Gainsight CoPilot increases adoption across the entire customer base

Since launching CoPilot, TigerText has seen a significant increase in Weekly Active Users across all billable organizations. The Total Messaging Volume has also gone up during that time. As a result of CoPilot emails, TigerText has seen an order of magnitude increase in low-touch customer engagements. With little to no manual effort from a CSM, TigerText can send out emails to hundreds of customers and thousands of end users and achieve a 26% average open rate. More complex, "stickier" features are being adopted at a greater rate, which has a direct impact on retention.

"With CoPilot, we're touching end users we've never been able to touch before. Our ability to engage with them has in some cases re-activated end users and converted them into champions. Now we have a new champion within that department who can activate 50 or 60 of his or her closest colleagues."

Activating champions through CoPilot, Dashboards, and CTAs

TigerText has a very clear and effective strategy for finding champions within customer organizations and increasing internal and external advocacy: automated CTAs spot and resolve adoption blockers, which leads to higher NPS and retention. CoPilot makes this possible by enabling broader, more effective email touch. It increases the number of success stories and surfaces power users and innovators, who advocate and champion the product. Gainsight allows the CSMs' progress through this chain of events to be operationalized and tracked. Best practices for mobilizing customer advocates all live inside the platform. Gone are the days of sharing optimal techniques over email or Google Docs; best practices are now embedded in the workflow. Now CSMs organically adopt and implement the most effective strategies. On top of that, they can confidently show what they're doing day-to-day and monitor the efficacy of it all inside one highly visual system.

ABOUT GAINSIGHT

Gainsight™, the Customer Success company, helps businesses grow faster by reducing churn, increasing upsell, and driving customer advocacy. Gainsight's product helps you touch customers effectively, track customer health consistently and transform the way your company orients around the customer. Gainsight provides a 360° view of customers and drives retention across Customer Success, sales, marketing, executives and product management. Learn how leading companies like Adobe, Box, DocuSign, HP, Marketo, Nutanix and Workday use Gainsight to help their customers succeed at www.gainsight.com.

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