



Customer Success

Account Management

# Automations

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# Automation is the application of technology, programs, robotics, or processes to achieve outcomes with minimal human input.

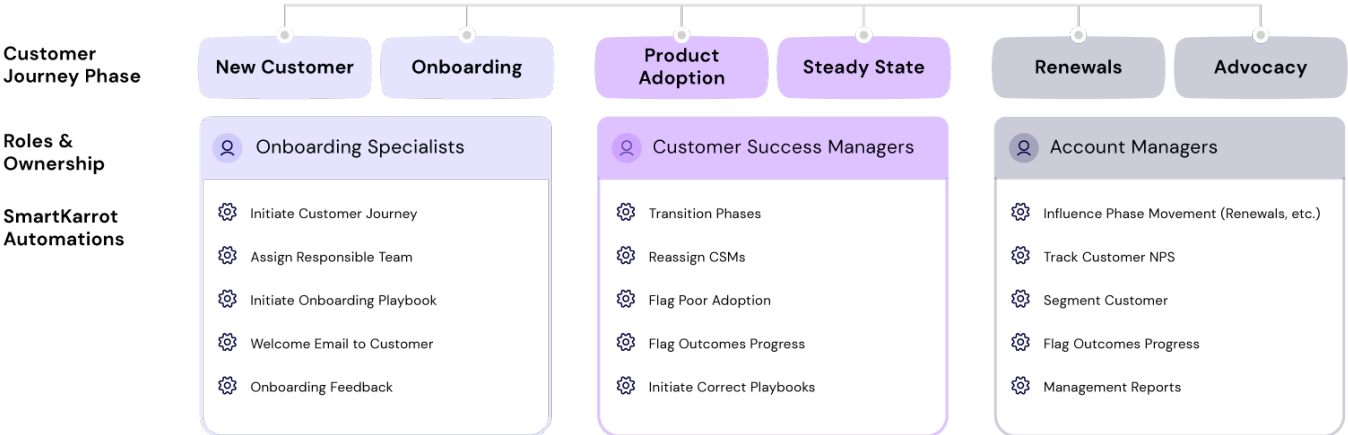
In context on technical platforms, automation can be done in various scenarios. It can be done for data entry, data processing, output, triggers, assignment and much more. Automation may help bring efficiency, reduce errors, help scale, save cost and time.

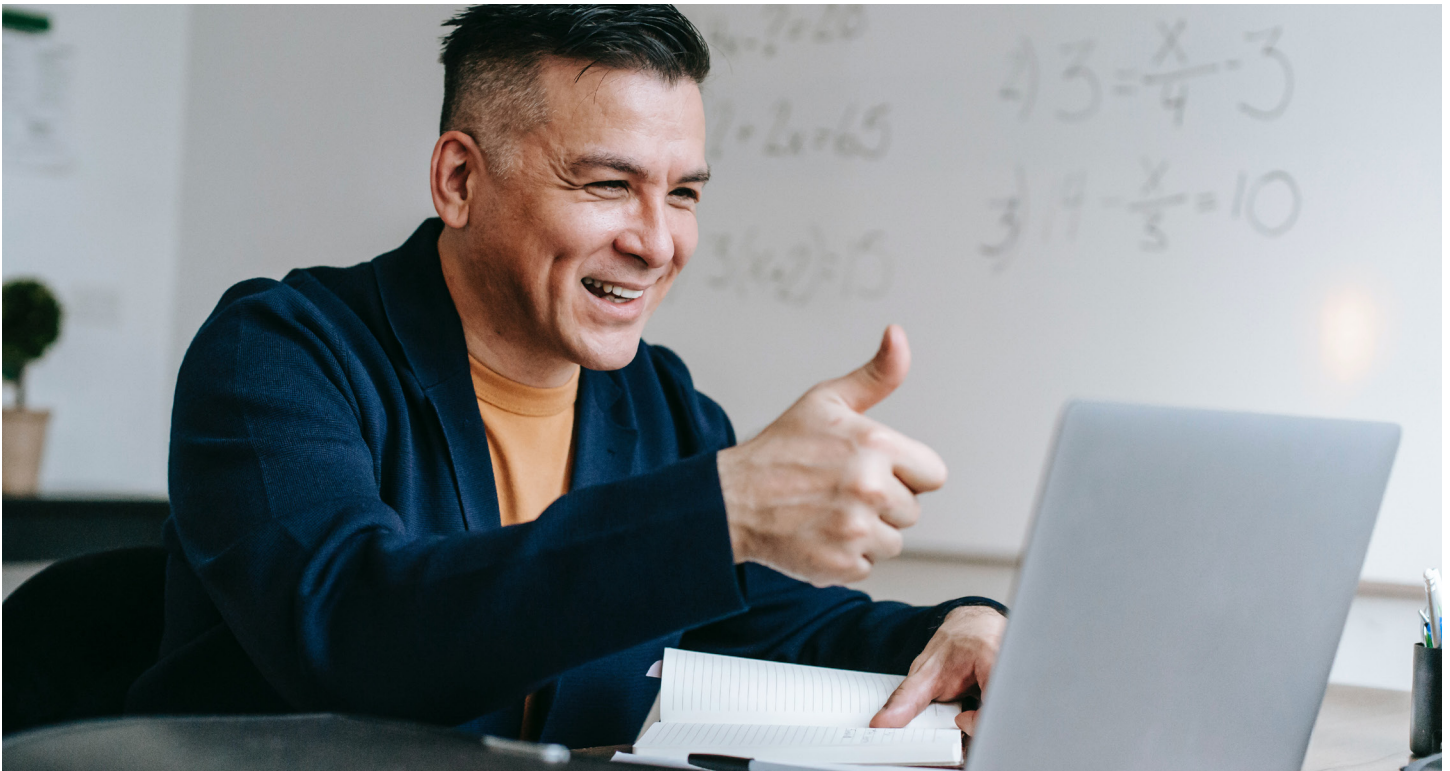
For example, ensure that customer journey is clearly mapped and tracked, no customer is left unattended, no red signs are missed in customer management, customer outcomes are tracked, and you are able to drive your upsells, renewals and customer onboardings as seamlessly as you wish!

Post sales workflows are wide-ranging and entail multiple data sets and workflows. If you imagine, it's like a complex maze from which we need to find meaningful paths leading to right outcomes.

This is where automation in customer success and account management can help! It can bring structure to the chaos, it can help scale through efficiency, it can bring efficacy to drive results and reduce time, efforts, and cost.

## Customer Journey Automations





Simplifying the post-sales maze and organizing it meaningfully, we get the following:

Customer Management Blocks



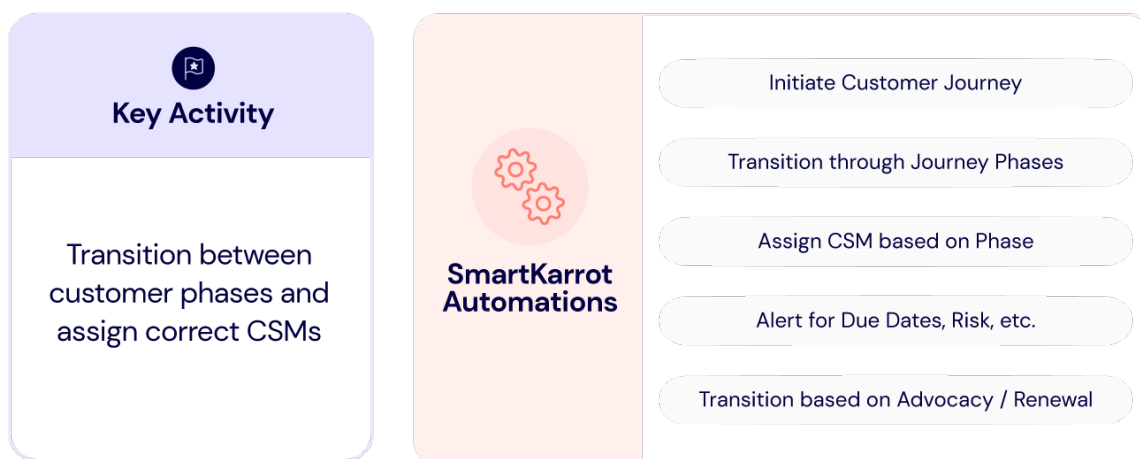
# Customer Journey & Ownership

It is imperative to keep track of the customer journey to ensure right outcomes are achieved at each stage of the journey. Once customer journey has been mapped out, it's time to lay out the operations to do Customer Success Manager (CSM) mapping. It is important to note that operations and ownership will vary immensely across these phases.

Thus, it should be ensured that the system is built such that its encompassing and agile.

## Possible automations in the customer journey and operations:

1. Initiating the customer journey
2. Transitioning between journey phases
3. Alerting based on red flags like drop in adoption or due renewal
4. CSM assignment



## What does SmartKarrot automate to enable customer journey and ownership?

1. Maps all customers to the default phase to kick-start the customer journey
2. Transitions between various journey phases
3. Assigns CSMs and playbooks
4. Alerts if there is a due renewal or there is any drop in adoption, health score or utilization
5. Influences phase movement like, moving into advocacy, renewal or risk phase based on triggers and/ or initiatives



**SmartKarrot allows you to define customer journey phases, assign default phases and transition into the next phase based on the duration of the previous phase.**

It automates CSM and/or playbooks assignments to accounts based account's life and customer journey phases. It's extremely easy to have all your customers due for renewal assigned to a renewal manager or all customer undergoing onboarding to be assigned to an onboarding specialist!



# Customer Triggers & Initiatives

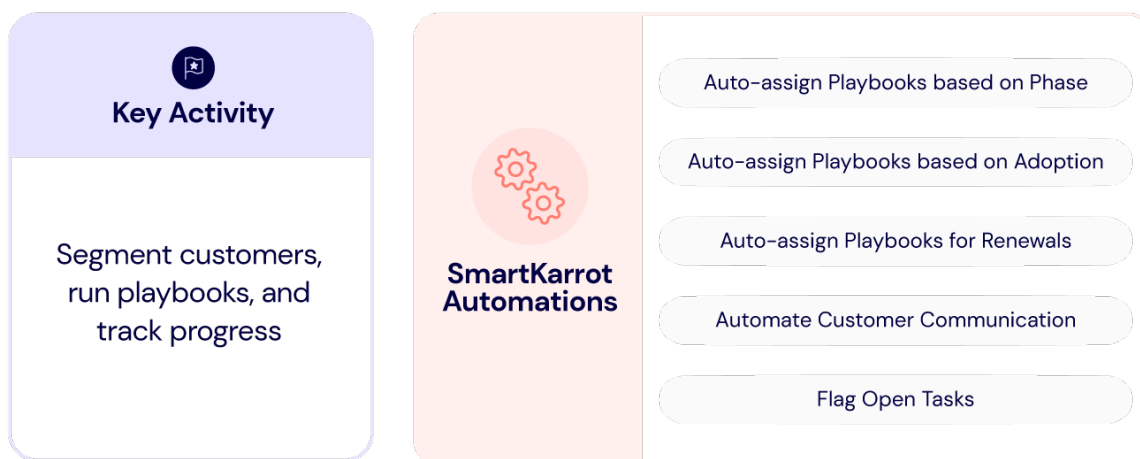
There is enormous depth and breadth in the customer success function. It spans from customer onboarding to renewal, customer engagement to sentiment, product adoption to escalation, last but not the least, customer outcomes to our NRR growth!

Mere keeping track of all these initiatives itself is a herculean task. Ensuring right initiative is mapped to the customer, the initiative is being tracked and brought to closure, proper assessment is

happening to optimize and that we are providing ample visibility is a must. And it's not easy.

## How automation for customer initiatives can help:

1. Initiating the right playbook for the customer
2. Flagging on the progress of the initiative



## What does SmartKarrot automate for customer triggers and initiatives?

1. Assigns a playbooks based on customer journey phase or triggers like:
  - poor health score
  - due renewals
  - lower product adoption or utilization
  - an account segment
2. Automates customer communication via playbooks
3. Flags all open tasks and initiatives for all owners



**SmartKarrot marries customer journeys, playbooks, automation and reporting to provide what our customers need.**

SmartKarrot automation triggers playbooks based on customer journey, utilization rate, fluctuation in health, due renewals and much more. It also automates playbook management using alerts and reporting to ensure simplified operations piece to bring ease to CSMs' lives.





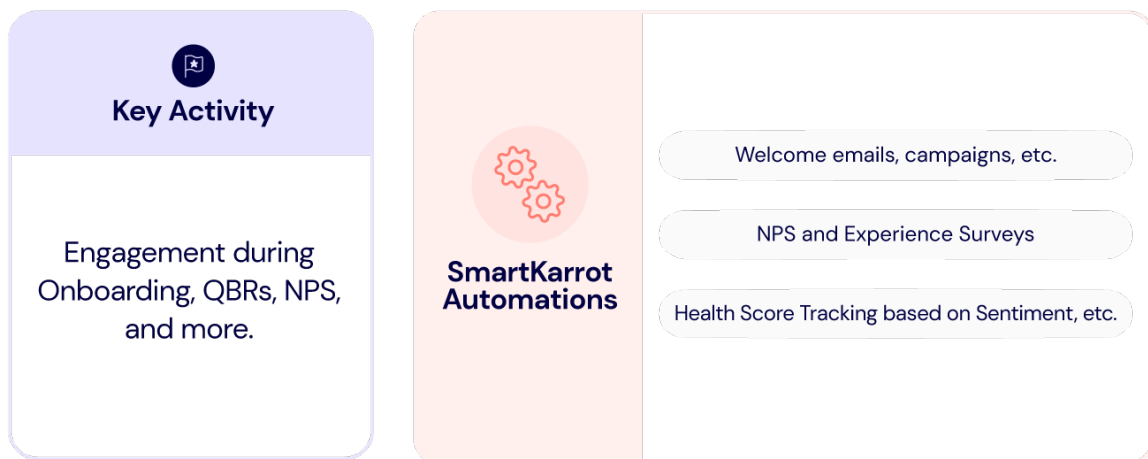
# Customer Engagement & Sentiment

Regardless of the organization size, type of customer engagement – high touch, low touch, tech touch and customer journey phase, customer engagement happens. It can happen via product, emails, surveys, meetings and many more ways.

To ease the burden off CSMs, certain predefined engagement activities can be automated. These can be standard surveys, welcome emails, periodic customer reach outs, others.

## What can be automated for customer engagement and sentiment:

1. Welcome email to customer
2. End of onboarding survey
3. Mass communication to customer on feature release, greetings, etc.
4. Yearly NPS



## What does SmartKarrot automate for customer engagement and sentiment?

Customer outreach:

- Welcome emails
- Onboarding communication
- Email campaigns on updates, releases, etc

Customer sentiment captures:

- NPS
- Onboarding experience survey
- Any rating scale-based survey

Impact to health score

- Customer sentiment can directly impact customer's health



**SmartKarrot automates customer email and survey reach outs basis various triggers, schedules, and initiatives. It's truly on the creativity of the user on how best they want to leverage the automation to bring more space into their work schedule.**



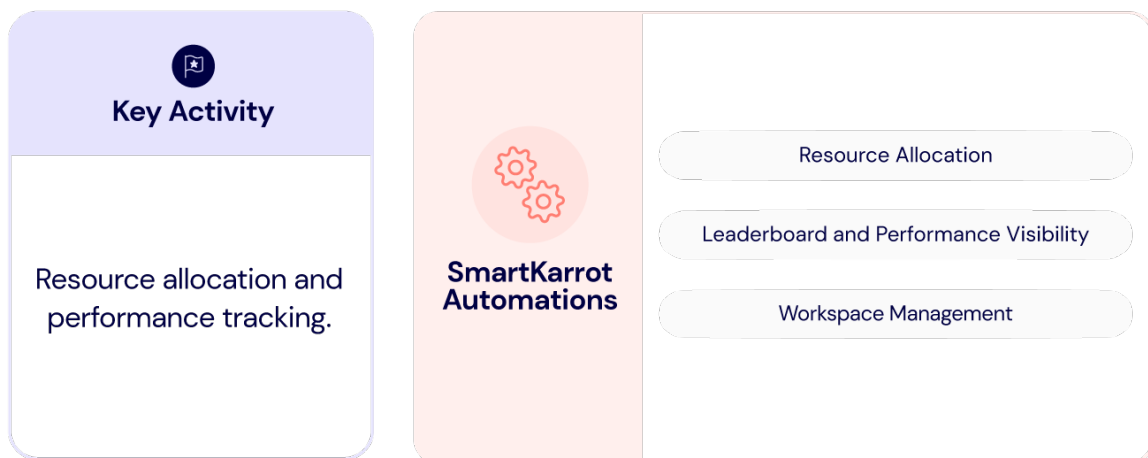
# Team Management

Team management is critical to any function and any business. It's often under-valued and is delegated to Human Resources. Given the reach of Customer Success as well as the evolution and dynamics of the role, it's essential to manage the resources and empower them to achieve more.

The value of automation in Customer Success today extends to resource allocation, associated communication, workspace planning, and more.

## What can be automated for team management:

1. Resource allocation
2. Tracking customer engagements
3. Workspace planning



## What does SmartKarrot automate for team management?

1. Resource allocation
2. Leaderboard and performance visibility
3. Workspace management



**SmartKarrot allows you to automate resource allocation, provide team performance visibility and unlike leading task management tools, SmartKarrot automates your daily to-do list! In a nutshell, the platform removes the clutter and presents what's needed in an automated way.**

# Financials & Reporting

And most important of all, how do we ensure that we are doing the business right?

Track all the right metrics, present in the most meaningful way and what matters is presenting those at the right time. Leaders appreciate visibility more than anything else because that becomes the guiding light for the journey ahead.

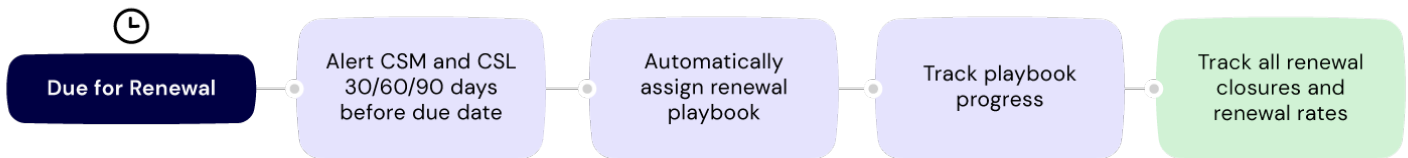
Knowing your upcoming renewals, the financial impact and overall renewal performance, having visibility into the potential expansions, not only when it's the renewal time but as soon as its applicable and everything else around your financial metrics is sacred.

How do you get all of that? Simple. SmartKarrot automates it for you!



**SmartKarrot sends all that directly into your mailbox. The platform allows auto-generation of reports and schedules them to reduce team dependencies and bring efficiency.**

## SmartKarrot Renewal Automation Journey



### Pre-Renewal

Flag all due renewals 30/60/90 days out

Send alerts and reminders to CSMs, CSLs and all required team members

Update customer journey

Assign renewal manager/ account manager

### During Renewal

Assign renewal playbook based on:

- Market segment
- Customer health
- Others

Track playbook progress by:

- CSM
- Segment
- Others

Send out renewal emails

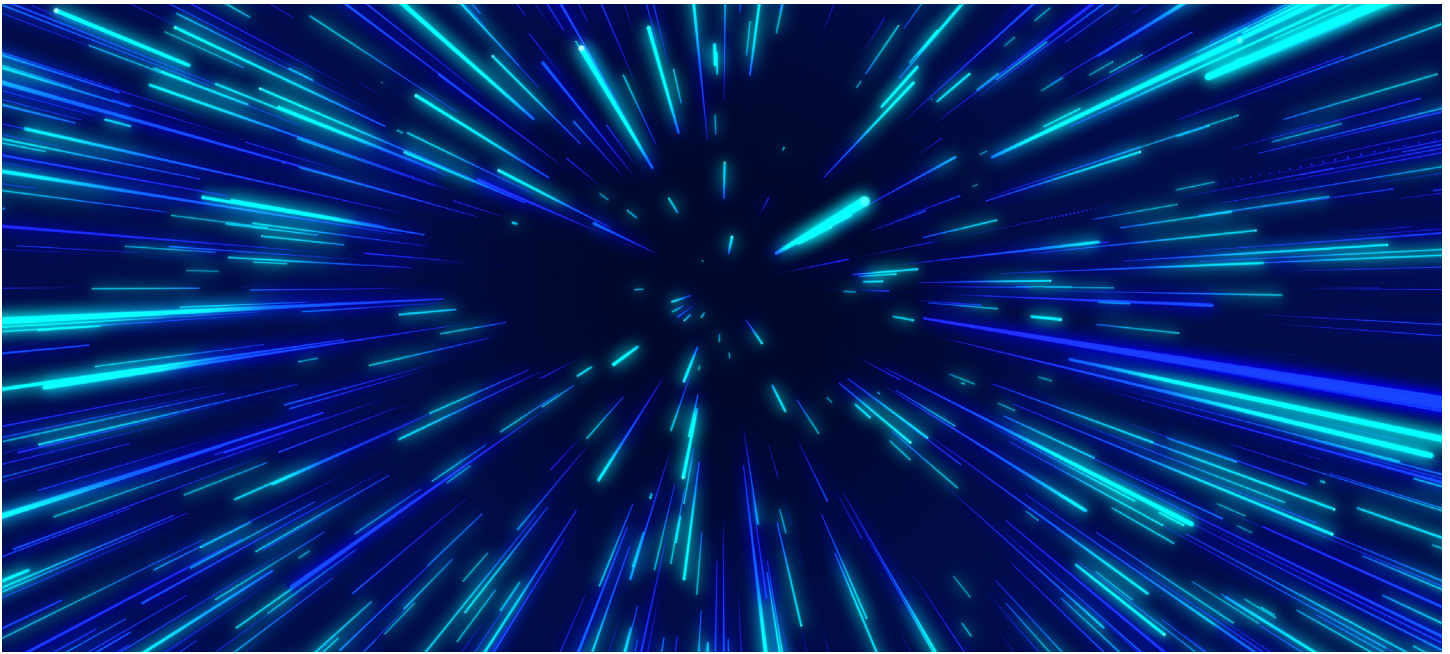
### Post Renewal

Receive reports in your mailbox:

- Renewals
- NRR
- Revenue spread
- Renewal-based Team Performance







## Conclusion

We are in a world of Artificial Intelligence (AI) and Machine Learning (ML) today. We have come beyond digitization. Comprehensive systems are no longer useful; they are a burden. Systems that are comprehensive underneath but present a user-friendly, lean, and automated layer for users to get maximum outcomes are needed today.

The adoption is quicker, and outcomes are valuable. Technical organizations need to leverage today's technology to make it easier for users to consume, be goal oriented and automated.

The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency.

The second is that automation applied to an inefficient operation will magnify the inefficiency.

—Bill Gates

# Customer Success Automations in SmartKarrot

Automation Type	Category	On the SmartKarrot Platform
New Accounts	Phase Assignment	Default assignment to 1st phase
Duration of a Phase	Phase Assignment	Phase Definitions
Phases	CSM Assignment	Automations
Churned Accounts	CSM Assignment	Automations
“New” Accounts	CSM Assignment	Automations
Phases	Success Play Assignment	Success Plays > Custom Settings
Category	Success Play Assignment	Success Plays > Custom Settings
Utilization Trigger	Success Play Assignment	Success Plays > Custom Settings
Renewal Due	Success Play Assignment	Automation > Custom Settings
Health Score	Success Play Assignment	Success Plays > Custom Settings
Account Segment	Success Play Assignment	Success Plays > Custom Settings
Playbooks (multiple triggers)	Email Send	Success Plays > Email Automations
Bulk email send	Email Send	Campaigns
Scheduled survey	Survey Send	Surveys
Renewal alerts and renewal manager assignments	Renewals	Customer Journey and Due Renewals
Red Flags	Alerts	Triggers
Reports generated and emailed	Reports	Reports > Custom Settings > Time Period
Auto-update on workspace	Workspace	Tasks Due and Open Items

