

# Customer Success



There are five key stages in the lifecycle of a customer. Each one plays an important part in the ongoing success of the customer, and more importantly, the ongoing success of your business. If you can manage each of the four stages correctly, you will reduce churn and increase revenue from your customers.



- **Prospect**--use data about prospect interaction with products and categories on your site to shape their first experience as a customer and validate their buying decision
- **On-Boarding**--provide customers with an on-boarding experience tailored to their goals and needs by driving them towards elements that will make them most successful
- **Educate and Support**--make customers aware of any new features or product enhancements and provide support when and where they need it in your application
- **Up Sell and Cross Sell**--find potential up-sell and cross-sell opportunities based on customer behavior in your application
- **Churn Reduction**--manage renewal opportunities and isolate any customers who are showing signs of potential attrition

Evergage can help you make each of the stages more impactful based on the actions or inactions of the customer and improve your revenue stream. Using Evergage to track and monitor customer activity across your product gives you insight into where they are in the lifecycle. You can get ahead of potential issues and deliver a personalized experience tailored to each customer's needs every time they are using your product.



## How to use these articles

The following articles offer best practices for using Evergage to optimize the experience for your customers and reduce churn

| Lifecycle Stage        | Qualification Criteria                    | Strategy  | Playbook ID/Name   |
|------------------------|---|---|--|
| Prospect               | Anonymous user                            | Various   | <a href="#">See Demand Generation playbooks page for more information</a>                              |
| On-Boarding            | Newly logged in customer                  | Create excellent first-time experience              | <a href="#">220 - In-trial – prospect on-boarding</a>  |
|                        |   |   | <a href="#">238 - Introduce helpful tips to drive customer success</a>                                 |
| Education              | New and existing customers                | Increase product usage and feature awareness        | <a href="#">166 - Display maintenance/outage message</a>   |
|                        |   |   | <a href="#">155 - Communicate new product launch</a>   |
|                        |   |   | <a href="#">164 - Call-out new product Features</a>  |
|                        |   |   | <a href="#">167 - Collect Net Promote Score (NPS) feedback (monitor, engage, learn)</a>                |
|                        |   |   | <a href="#">104 - Add survey and show relevant content to answers</a>                                  |
| Cross-sell and Up-sell | Existing customers using the product      | Drive revenue and customer satisfaction             | <a href="#">303 - Promote Features with Evergage for Email</a>   |
|                        |   |   | <a href="#">230 - In-app message customers who have been sent an email offer (with the same offer)</a> |
| Support                | Customers looking for additional guidance | Provide the right information at the right time     | <a href="#">223 - In trial – offer additional support</a>  |
|                        |   | Reduce overall support costs                        | <a href="#">165 - Reduce support calls</a>   |
| Churn Reduction        | Customers in renewal cycle                | Identify potential churn indicators and take action | <a href="#">227 - Churn reduction – remove access to features</a>                                      |
|                        |   |   | <a href="#">247 - Use callouts to promote unused features</a>  |