

Customer Marketing Use Cases

planhat

Modern marketing teams use tools like customer success platforms (CSPs) that house reliable customer data used by customer success teams to identify and communicate with customers that meet specific criteria, by using data that otherwise lives in multiple systems.

Summary

With a central platform for customer-facing teams facilitating both advocacy and revenue generation, campaigns offer a world of possibilities, regardless of complexity.

Examples

- Identify and engage with specific user groups, such as at-risk decision-makers in New York using Product X with an upcoming renewal date, for targeted events as a retention strategy
- Identify, analyze and nurture candidates as part of a broader advocacy program, or in a simpler form, identify candidates for speaking on webinars or joint events
- Run data-dependent communication, for example a templated text email, sent by Marketing but 'from' the CISO, to security contacts after a data breach.
- Track how touchpoints across the entire customer journey influenced NRR



If you are affecting product usage, which leads to a decrease in churn, or you're driving expansion revenue, which leads to an increase in bookings or net dollar retention, you're going to have more of a say.

Kyle Lacy, CMO, Jellyfish

Top benefits of using a CSP for customer marketing campaigns

1. Attribute efforts to outcomes by monitoring critical touch points across the lifecycle
2. Optimize campaigns with real-time customer data you need in one place
3. Focus on revenue metrics with full access to your customer lifecycle data
4. Create streamlined, collaborative workflows visible across the organization
5. Leverage automations and saved filters for more efficiency
6. Use real-time data on product usage, tickets, conversations, NPS, for better targeting
7. Segment and create niches to understand customers and personalize interactions

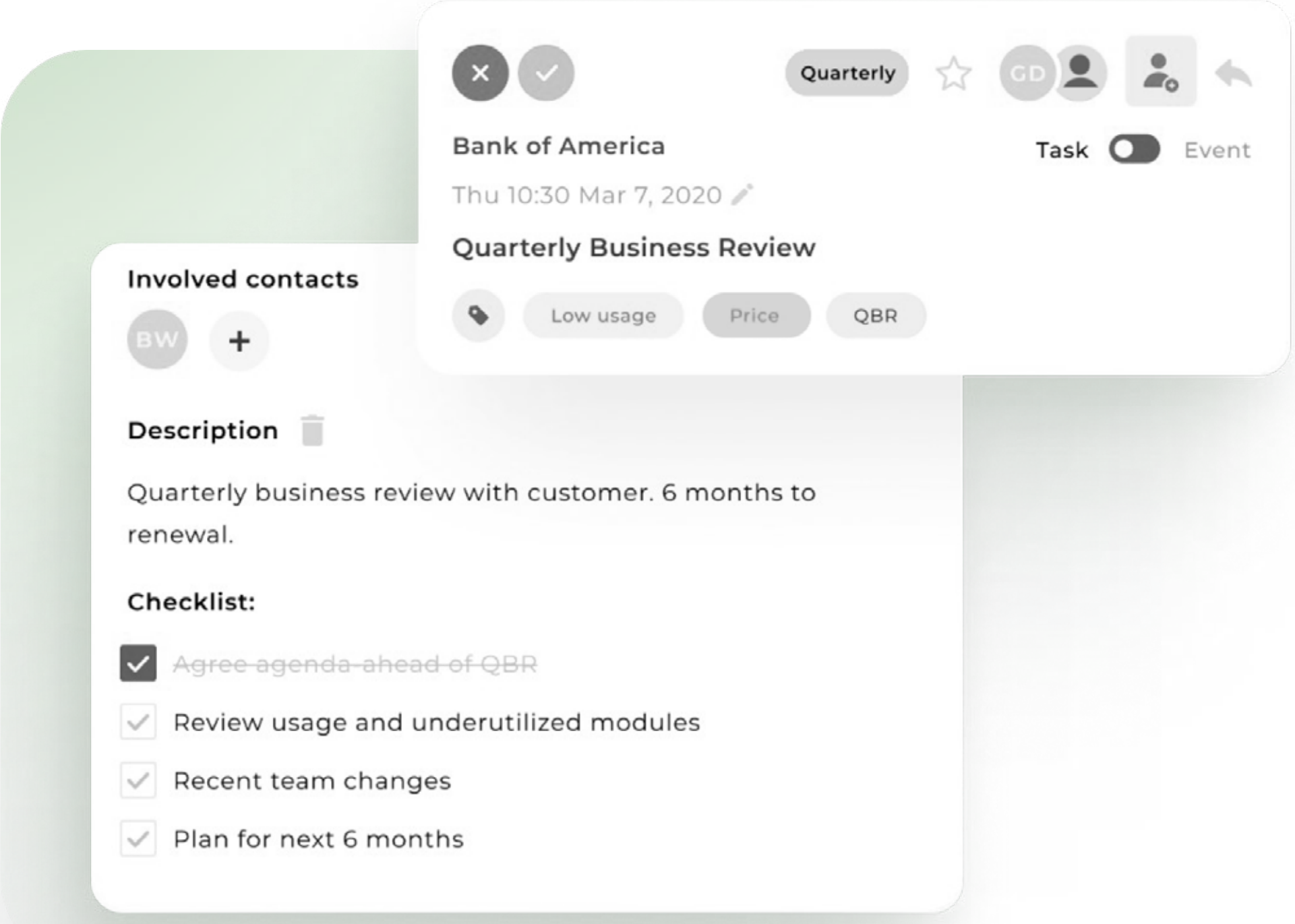
Workflows in Action

Customer Communication

Having a shared communication channel with your client is a great way to provide additional value through education, loyalty programs, or shared visibility into progress against customer outcomes.

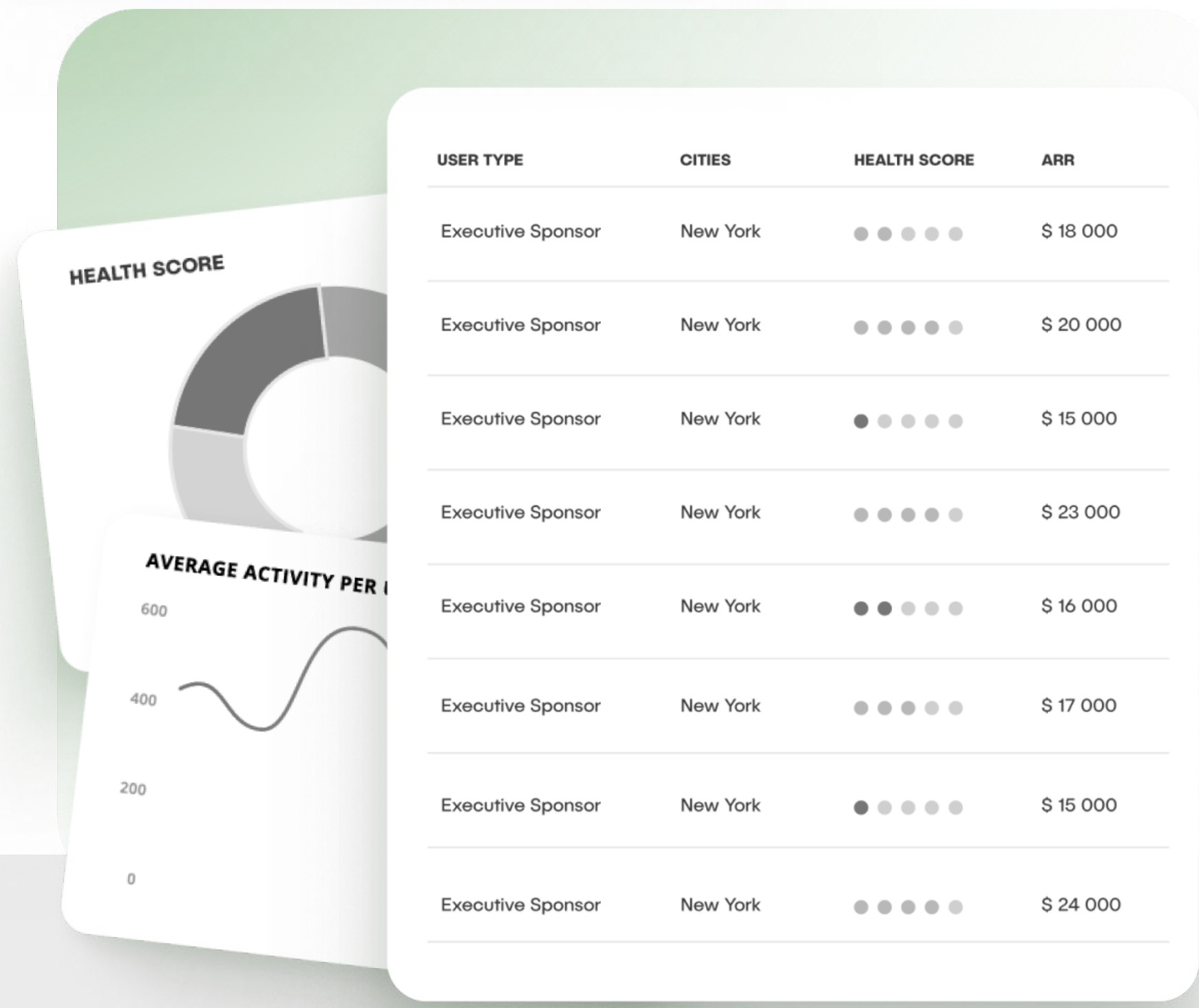
Collaboration between customer marketing and customer success can be made through scaling communication. A portal can host presentations, videos, and external links tailored to each customer, enhancing a personalized experience.

Using a shared customer-facing portal allows both teams to deliver consistent yet personalized messages.

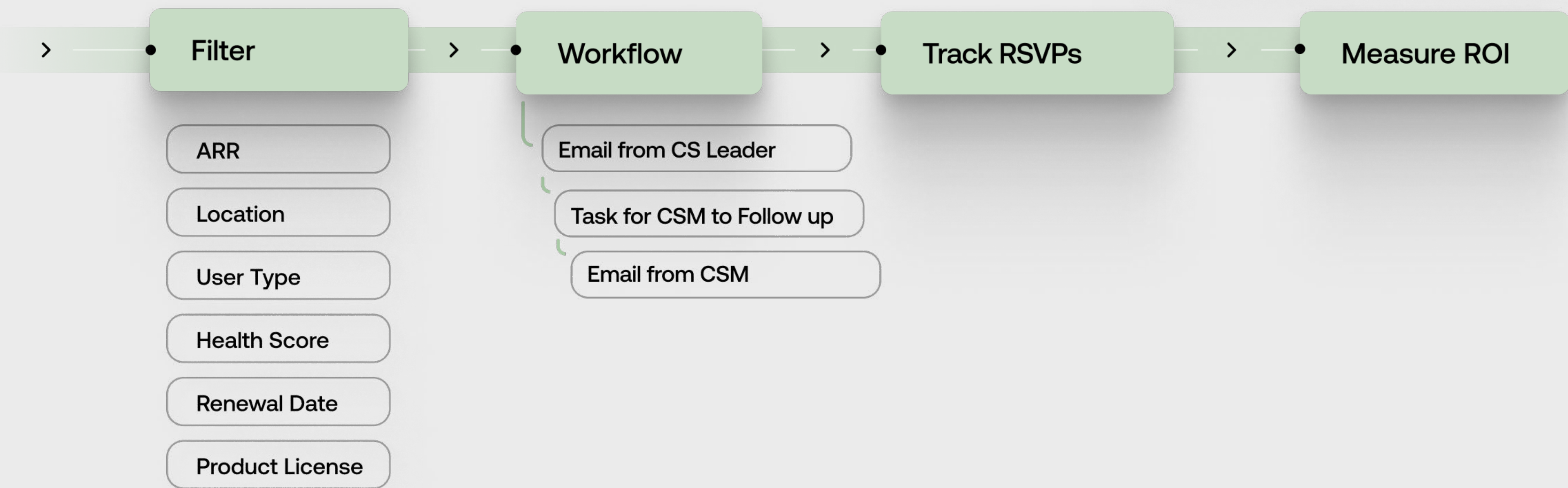


Retention Campaigns

Retention is the flagship of Customer Success. Once churn risks are identified like low product usage or health scores, automated alerts to Customer Success Managers can prompt collaborative campaigns with marketing to address those challenges. For instance, organizing in-person events can help to rebuild trust and loyalty with at-risk clients.

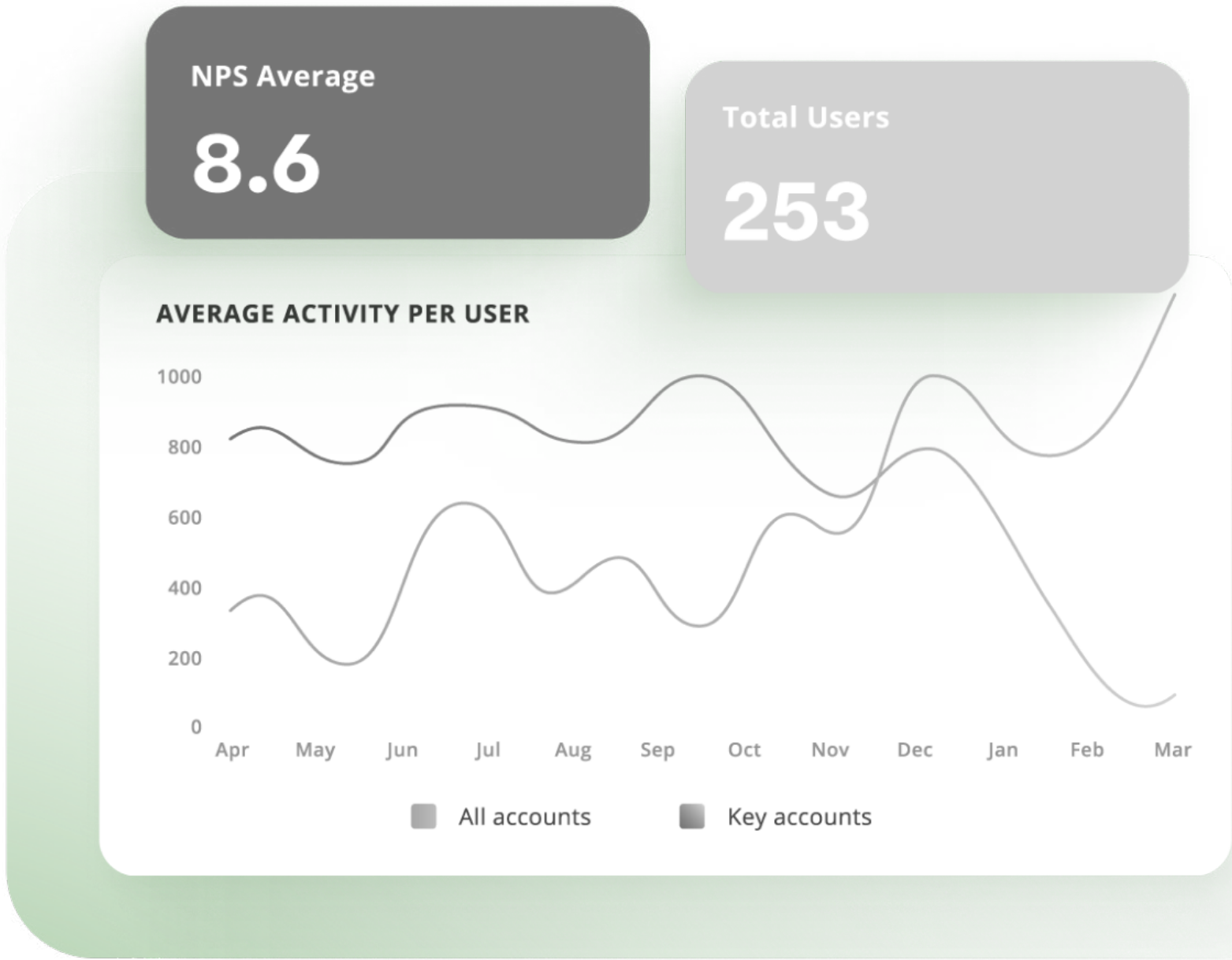


How much ARR for Product Y is attributed to this campaign?

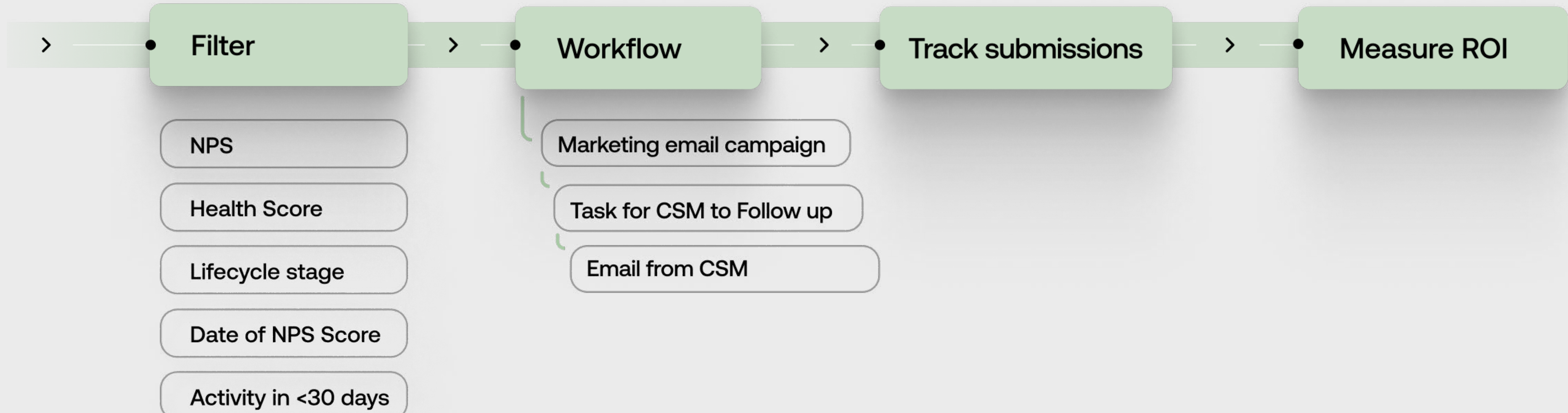


Advocacy Campaigns

Third-party reviews help to provide credibility for a company's reputation, and can be a huge asset to gain trust with customers and prospects. Obtaining reviews and testimonials is low hanging fruit when you know who your biggest advocates are based on satisfaction scores such as NPS.



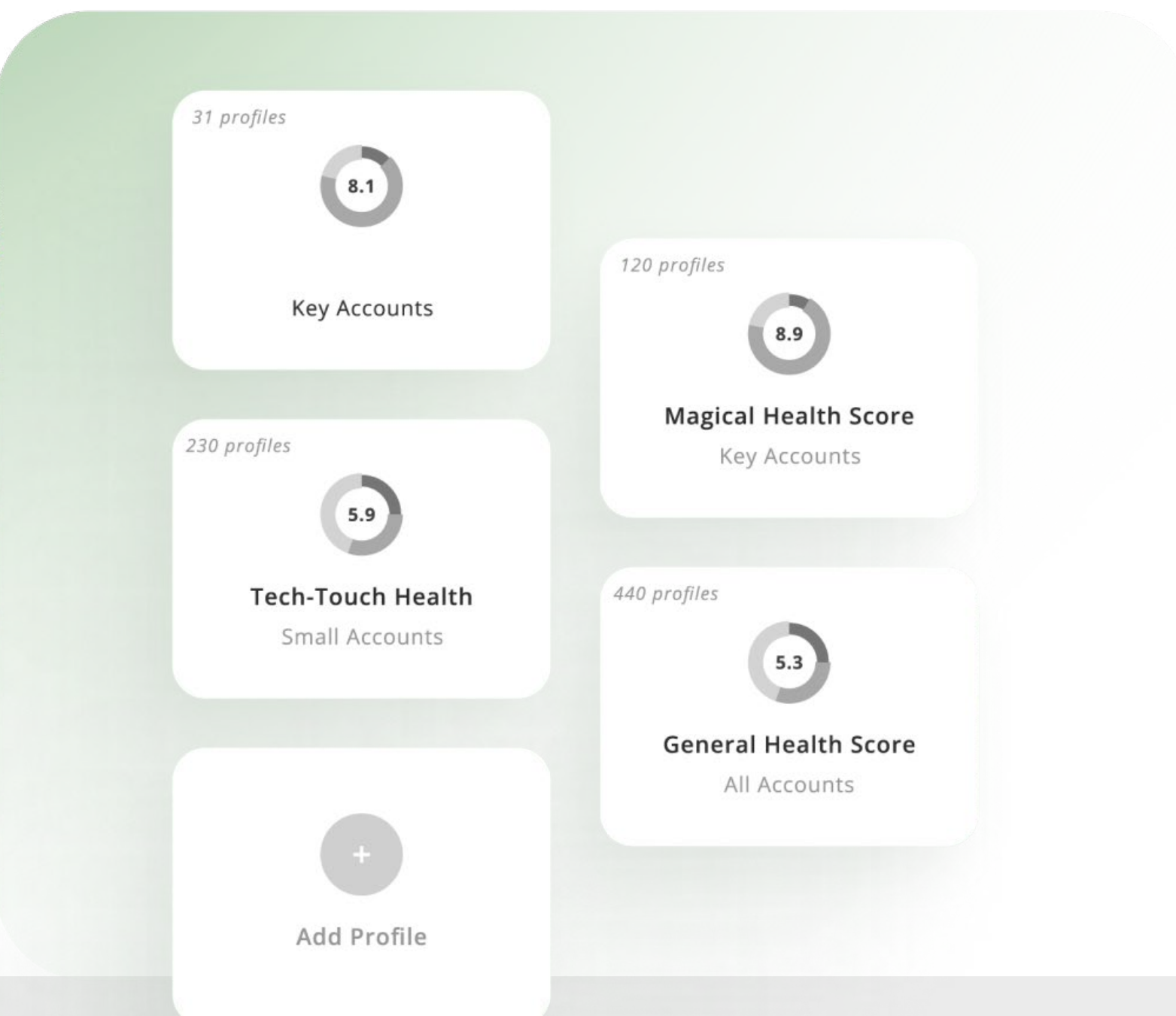
How many reviews were generated and boosted our scores?



Expansion Campaigns

Upselling, adding new users or features, increasing support, cross-selling with new product lines, and more.

In expansion campaigns, customer marketing can contribute by using data segmentation to develop targeted, relevant messaging at scale for the right customers at the right time.



How much ARR for Product Y is attributed to this campaign?

