## CUSTOMER

**APPCUES**

Appcues lets you add an experience layer to your product to help you improve user onboarding, capture feedback, and drive new feature adoption.

- **BUSINESS:** B2B SaaS
- **FOCUS:** Customer Experience
- **LOCATION:** Boston, USA

## CHALLENGE

Appcues wanted comprehensive insight into customer health and key Customer Success metrics.

## SOLUTION

Appcues used Natero to connect customer data silos for a complete view of account health at any point in time.

## RESULTS

The Appcues team has more visibility into their accounts and can make better decisions about priority and next steps.

- **Customer 360**
- **Health Scoring**
- **Proactive Alerts**
- **Workflow Management**

# Appcues Manages Customer Success Using Data-Driven Insights

Appcues is a user engagement platform that accelerates growth for software companies by helping them create product experiences that are user-friendly and personalized.

"We help our customers make products their users love," says Shonak Patel, Director of Customer Experience at Appcues.

"I view it as our critical responsibility to become an extension of every customer's team. Everything we do is in service of our customers."

This customer-driven approach led Appcues to establish a dedicated Customer Success (CSM) team to address customer needs in a proactive and systematic way.

Early on, the CSM team realized that they needed a clear view into customer interactions and behavior to deliver great customer experiences.

However, the sheer amount of customer data in different third-party systems presented a significant challenge.

Like most SaaS companies, Appcues has customer data across a slew of business tools. HubSpot holds sales and marketing touchpoints, Help Scout has support interactions, Stripe contains billing information, and product usage feeds into Segment and Amplitude.

Appcues had a hard time creating a holistic view of customer health, and the Customer Success team lacked valuable context that could help inform them about when and how to take action.

## "We needed a tool that would help us organize, track, and support our customers in a more proactive manner."

The Customer Success team began to look for tools that could help. Specifically, they needed a system that could connect all of their customer information and usage data for a complete view of customer health at any point in time.

## "Natero's integrations not only fit our current needs but also included others we may use in the future."

The team also wanted proactive alerting for at-risk accounts, and the ability to build (and change) processes while they scaled the team and refined their Customer Success model.

Natero made the final cut thanks to its extensive integrations, data-driven alerting, and workflow management capabilities.

"We completed our data integration in a little over 30 days," says Jackie Smith, Customer Success Manager at Appcues. "The Natero team delivers great, responsive support. You never feel like you're on an island."

Right away, Appcues began experimenting with Natero's sophisticated health score model and alerting functionality. This allowed the CSM team to automatically monitor important customer metrics around product usage, Net Promoter Score, and support tickets.

Now, CSMs have more visibility into the health of an account and can make better decisions about priority and next steps.

## "Natero helps us stay on top of, and in front of, our key accounts."

Appcues further streamlined their team processes by automating CSM account assignment and triggering tasks for onboarding new customers.

The team also shares data-driven insights using customized dashboards that track the status of managed accounts and even potential upgrade opportunities.

## "Natero empowers us to build and scale our processes quickly. The future looks bright."

## About Appcues

At Appcues, our mission is to help teams build products their users love. With Appcues, you can create in-product experiences (onboarding, surveys, announcements) without writing any code. We believe it's the non-technical people who oftentimes have the best information about a user's needs and desires. And we give them the tools to act on it and improve user engagement. All the while, we allow engineers to focus on building the core functionality of the application for the long haul.

🌐 www.appcues.com
🐦 @Appcues

## About Natero

Natero helps Customer Success Managers reduce churn, increase expansion, and manage more accounts with less effort. Natero is the only Customer Success solution to combine predictive analytics, customer intelligence, and workflow management in a unified platform. This next generation solution helps B2B software providers prioritize, automate, and scale their Customer Success processes.

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