

MURAL creates a comprehensive customer lifecycle management program and saves days of work each week with ClientSuccess

MURAL is a growth stage company committed to giving everyone a visual workspace no matter how dispersed their teams are. MURAL customers scale innovation, increase creativity and exchange ideas through digital whiteboarding and design thinking.

The Challenge

The Customer Success team at MURAL includes 7 CSMs, 1 Manager, and 1 Head of Customer Experience. “We are a small team managing a lot of customers per CSM,” said Alicia Ness, Manager of the Enterprise Transformation Team. “Each customer can require anywhere from a dozen to 100+ tasks and touchpoints per year, and we needed to manage the customer lifecycle in a more cohesive way. We needed to take some of that mental burden off of the CSMs so they could focus on more proactive and strategic customer work.”

The CSM Team at MURAL needed help with:

- Lifecycle management
- Tasks and reminders
- Renewal management
- Early risk mitigation
- Creating cross-department transparency



Reasons Went with Client Success:

1. The user interface is really clean and minimal, while giving you exactly what you need to make decisions and document important information
2. Had all of the functionality they needed without overcomplicating the solution
3. Small business and budget friendly
4. The team at ClientSuccess was amazing and easy to work with

1 - Data Consolidation

“Before ClientSuccess, we’d have to do a lot of research and planning work in order to have a good discussion about a specific client. For each customer, it probably took us about 2 hours to gather the data, review the analytics, update the tasks, look at the notes, open the different tools, plan next steps, etc.”

“Now, with ClientSuccess, all of that data is in one place. What used to take us 2 hours of work, now takes us 15 minutes. We’re seeing a lot of results in terms of the mental bandwidth that we have, being more on top of things, having more time to actually focus on work rather than planning work.”

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“We’re also having more conversations about renewals and asking questions like “Hey, where is this?”, “Why isn’t it through yet?”, “What are some of the risks?”, or “How can we help you?”. The tool gives us visibility into missed opportunities and really opens the door to discussions that maybe wouldn’t have happened if all of that data wasn’t in one place. It’s our one stop for standardization and inspiration.”



2 - Lifecycle Management

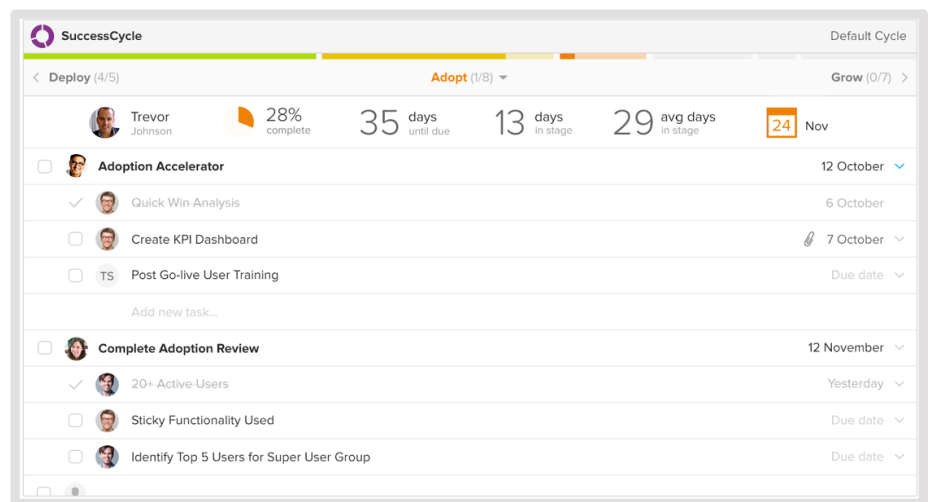
“One of the biggest things we were looking for in a tool was lifecycle management. At MURAL, we’re managing a lot of customers per CSM. One logo could potentially have 20 different buyers that all are on different lifecycles and all have different goals and values as a team. We really struggled to manage all of these touchpoints throughout the lifecycle and many of them were extremely high touch. We did some counting and for our low touch customers it was something like 40 touchpoints per year and for our largest customer that could be anywhere up to hundreds of touchpoints per year. It just became too much to manually think about and manage on our own. We were missing a lot of major touchpoints and important opportunities.”

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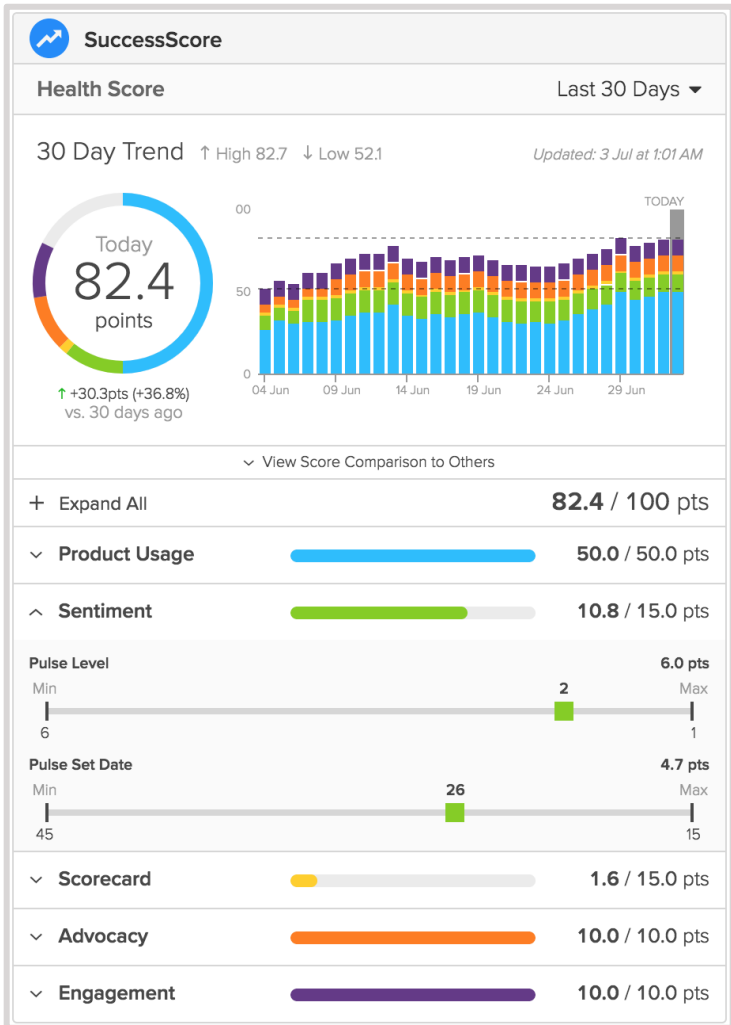
“About the same time we bought ClientSuccess, we also did our first segmenting of customers between low touch, medium touch, and high touch. We created a checklist that is in the SuccessCycle module of ClientSuccess that has a different set of touchpoints for each of those segments. We then outlined all the key milestones for all of those segments. Our lifecycle stages, for example, are onboarding, adopting, gaining value, advocating, and renewing. There are key milestones at each of those

stages that we must hit. Each CSM also gets a little more granular and includes smaller things that we don’t want to forget. The “to-dos” have really taken the spotlight in terms of helping the CSMs remember the important things they need to do for their customers and when.”

“ClientSuccess helps us document challenges across the user journey and make them transparent to other stakeholders internally at MURAL. It makes it very clear to everyone in the company what’s important to us as a team, the goals we have for our customers in terms of delivering value, and the partnership that we hope to have with others at the company.”



3 - Customer Pulse and SuccessScore



“We needed a tool that would capture the overall health of the customer; things like product usage, sentiment, advocacy, and engagement. We needed something that would help us proactively prevent churn earlier.”

“We use the client grid on a daily basis to create custom priority lists. For example, we create one list based on Last Engaged Date and another one by the date the last Health Score was entered. If a CSM’s priority for today is reaching out to people they haven’t talked to in a long time, then they’ll sort by Last Engaged Date. If the priority is sharing new features with people who are at risk for churn, then they’ll sort by Usage. This allows us to get smart about the types of customer touchpoints that we complete and when.”

“The leadership team looks at ClientSuccess as a way to provide proactive coaching to the Customer Success team. They can go into a particular customer record and see which issues are being talked about. This allows for real-time

collaboration and helps the leadership team have more educated discussions with the CSMs. If the leadership team doesn’t have access to a CSM then they can quickly look at the SuccessScore as an indicator of the health of the customer. The SuccessScore is a little number that is like the brain of a CSM attached to an account.”

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4 - Why ClientSuccess

Alicia Ness is a Manager of the Enterprise Transformation Team and played a critical part in the selection of ClientSuccess and its subsequent implementation. Here are a few things she said about ClientSuccess...

“I love ClientSuccess. The culture of its people is wonderful! Everyone is so kind and helpful; I really enjoy that they teach customers how to make ClientSuccess a part of their core operating strategy and they do that well. I always feel supported and like a member of the family when I talk to people there. Everyone has been amazing; from support all the way up to the CEO. That consistency is very notable.”



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“We really like the way the user interface was designed. It’s really clean and minimal, but gives you exactly what you need to make decisions and document important information.”

“ClientSuccess had all of the functionality we were looking for. It had things like renewal management and having our own source of truth (a place where sales reps can’t go in and fiddle with important notes by accident, like Salesforce). Also, early risk mitigation, which allows us to catch if a customer stops using the product.”

“I went to CS100 last year and I will be there again this year. I was blown away by how warm and welcome every single person was. The content of the conference was inspiring and it built this really nice foundation of trust in the partnership that we want to have with ClientSuccess. I think that’s hard to come by.”

“I’ve used Totango in the past and been to a Gainsight conference before, the experiences there were nowhere near the experiences we’ve had in a short time with ClientSuccess.”