

# A Dedicated CS Platform Means A More Productive CS Team and Better Trial-to-Paid User Conversion

INCREASED TRIAL USER CONVERSION

SCALED TO 500+ CLIENT ACCOUNTS

REDUCED CHURN ACROSS THEIR GROWING CUSTOMER BASE

## The Overview

RFP360 was founded to help customers develop strategic RFP processes that deliver results. As the only full-circle RFP management solution for issuers and responders, the platform simplifies the proposal process for businesses around the world.



The company's innovative technology and procurement expertise help organizations cut their project response time in half. RFP360 enables users to create twice the opportunities while boosting their business's RFP win rate.

## The Challenges

One of RFP360's core values is to deliver an exceptional customer experience to every customer, regardless of account value. As the organization underwent rapid growth, their Customer Success (CS) team struggled to:

- Maintain a pulse on their customer portfolio. As their customer base rapidly expanded, RFP360's CS Consultants lacked a centralized CS workspace for onboarding, engagement and support activities.
- Scale their processes. The team had no way of viewing customer activity without manually searching for specific account metrics. This imperfect approach meant the team was reactive rather than proactive, in their account management.
- Identify accounts in need or predict a customer's likelihood to churn. Dispersed customer information made it difficult to identify which data points were most applicable to measuring customer health.

- Deliver the right touchpoints at the ideal times. Automating the customer journey and other important communications was a must for this growing team.
- Understand their most important prospects - trial-users - and monitor how they were using RFP360. A lack of user insights meant lost opportunities to optimize trial conversions.

## What RFP360 Did

RFP360 and ChurnZero partnered to accomplish the following:

- **Automate manual, repetitive activities to improve scalability.** Automation means that the team has more time to provide an exceptional customer experience to the accounts that need it most.
- **Centralize customer success efforts** and present customer data in an easy-to-understand format with ChurnZero's intuitive UI and reporting.
- **Improve customer visibility to ensure that the team doesn't miss a beat when managing their book of business.** ChurnZero's robust reporting and powerful analytics deliver deep, actionable customer insights at the moments it matters most.
- **Optimize customer trials with enhanced user insights.** Strong usage insights have contributed to more than increased retention. With trial subscriptions an important part of the RFP360 sales cycle, the team has been able to monitor how trial users engage with their product. As a result, the team has optimized trial subscriptions and converted more users into paid accounts.
- **Make their account management more proactive by implementing real-time customer health metrics.** RFP360 and ChurnZero worked together to identify and weigh customer data points. These are culminated in a ChurnScore that gauges a customer's likelihood to churn or renew.

## The Impact

In less than a year, RFP360 has experienced the following results:

- **Increased efficiencies** across their entire CS department. By automating their operations, the CS team scaled their workload with a growing userbase without adding additional headcount.
- **Better oversight into user activities and trends** with aggregated customer reporting. CS teams can better track behavior trends, flag at-risk accounts and guide users towards success. Leadership uses Live Exports to analyze data via 3<sup>rd</sup> party visualization tools and share these insights organization wide.

- **Stronger trial-user conversion** by monitoring usage reports to understand and encourage success behaviors. These insights have optimized the trial subscription journey and has resulted in more conversions of unpaid users.
- **More productive customer conversations** by centralizing and contextualizing their CS data. The team reduced their reliance upon gut instincts and instead relies upon concrete data from ChurnZero.
- **Realized measurable ROI** after investing in a dedicated CS platform. Besides reducing churn, the team is better equipped to drive upselling, cross-selling and trial-user conversions.

## How You Can Start

After exploring various Customer Success solutions, RFP360 found ChurnZero to be best positioned to grow alongside their CS team. ChurnZero allows the company to maintain a real-time pulse on customer health while making every customer interaction count.

CS Consultants have streamlined their outreach through automation. They are ensured that the right messages reach the right customers at the right time. ChurnScores have unlocked actionable customer insights by making sense of the health indicators that matter most. RFP360's leadership team has gained immense customer visibility with ChurnZero's robust reporting and easily accessible data exports for further visualization.

If you want to understand how your customers use your product, how to increase user adoption and how to assess your customer health, our team of Customer Success Managers are ready to help.

Ready to join the ChurnZero family? Visit [churnzero.net](https://churnzero.net) to learn more.



*“The platform delivers the key functionality you would expect with a Customer Success management platform... what sets ChurnZero apart is the overall customer support and the [vendor] relationship”*

**Brian Hartley**  
Senior Director - Customer Success  
RFP360