

# Smoothwall reduces churn by 4% with new onboarding journey and health scores



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  - **25% increase** in account coverage
  - **2x increase** in logged CSM activity and engagement
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## The overview

Smoothwall is the leading digital safeguarding solutions provider in UK education. More than 12,500 schools, colleges, and multi-academy trusts depend on Smoothwall's technologies to maintain record compliance and keep their students safe while online.

## The challenges

Like many fast-growing SaaS companies, Smoothwall's initial business focus was customer acquisition and revenue growth. After acquiring more than 3,000 customers and falling into reactive account management, the company realized its strategy needed to shift from a growth-based mindset to a more customer-orientated approach.

The first step was to create a dedicated Customer Success (CS) team. Smoothwall divided the roles of account managers and Customer Success managers (CSMs). Rob Wilkinson, director of CS, says, "We needed to find a way to operate at scale and apply our new ethos, working practices, and goals across our customer base."

Rob is responsible for Smoothwall's overall customer experience, which includes CS, support, onboarding, and project teams.

On the heels of the company's massive growth, Rob and his newly formed CS team faced the challenge of standardizing service and providing more proactive customer outreach while managing an ever-growing number of accounts per CSM. Adding to the complexity was a diverse customer base of small schools to large multi-academy trusts and multiple product lines. A one-size-fits-all engagement model wasn't going to cut it. The team needed the means to deliver a hybrid approach that blended high-touch and tech-touch strategies.

To get a handle on their customers' health, the CS team attempted to calculate it manually via Excel; an endeavor that proved as frustrating as it was futile. "We have thousands of customers and understanding the health of those customers wasn't a challenge, it was a logistical impossibility," says Rob. "We simply didn't have the customer data to support it."

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This lack of visibility extended beyond the customer base. With the pandemic driving the company to go fully remote, Rob lost direct oversight of his team's activities. "As managers, we now work in a world of greater trust," says Rob, "but what comes with that is a trade-off of greater visibility."

## The process

With ChurnZero, Smoothwall is transforming its customer experience by:

- **Onboarding new customers at scale using an automated journey.** The team codified their highest-performing onboarding process using a ChurnZero journey to deliver the same remarkable experience with proven results across the customer base. "The new customer journey has been incredibly powerful," says Rob. "We know that renewal starts from day one and a healthy onboarding experience sets the foundation for a positive relationship." Their customer journey includes a welcome email, scripted tasks for CSMs, and alerts based on customer behavior.
- **Improving implementation and onboarding based on direct customer feedback.** The team set up an automated CSAT survey campaign using ChurnZero that triggers when customers complete implementation and onboarding. Prior to ChurnZero, the implementation team evaluated their service based on transactional aspects such as the product being installed on time.
- **Delivering a 360-degree view of customer health at the user and account levels.** The team created a primary ChurnScore that weighs core account attributes and engagement to evaluate customer health. "We live and breathe ChurnScores now," says Rob. "They're fundamental to our operation." The team also created a ChurnScore centered on adoption to assess customer behavior inside the product. "It evaluates more binary data, such as product usage by school, which is less interpretive," says Rob. "Now, we can identify more subtle under-the-hood risk by listening to what the data is actually telling us instead of relying only on CSM sentiment."
- **Motivating CSMs to reduce churn with ChurnScore contests.** Rob gamified customer health to make it, dare we say, fun. CSMs are challenged as individuals and as a team to reduce ChurnScores each week. It's now one of the team's key performance metrics. "You compete with yourself to get better, but you also work toward a North Star goal," says Rob. "A huge part of CS is working collaboratively as well as individually, and this harnesses that."
- **Acting on customer health and increasing shared accountability.** The team automated action plans based on ChurnScores to ensure customers who might be at risk get in-the-moment, tailored support. "CSM sentiment is one of the most effective yet simple tools," says Rob. "A CSM's ability to rate customers and then trigger plays, tasks, journeys, emails, and more based on that score is scalable and extremely impactful." By integrating ChurnZero with Zendesk, CSMs get alerted when a high-risk customer logs a support case so they can escalate the matter. ChurnZero also queues a personalized email to the customer offering support for the CSM's approval.
- **Delivering quick snapshots of granular customer data.** As a manager, Rob uses Custom Dashboards for instant insight into ChurnScores, engagement metrics, risk analysis, journey tracking, and customer feedback. "The visibility from ChurnZero dashboards gives me confidence that we're in control of what we're doing," says Rob. "It doesn't mean there aren't problems, but I can see those problems and ensure we take the right steps to resolve them."

## The results

Since using ChurnZero, Smoothwall has seen the following results:

- **4% reduction in churn** of the core customer base.
- **25% increase in account coverage.**
- **2x increase in logged CSM activity and engagement.** "We've seen an exponential increase in CSM activity across our customer base in terms of tasks and meetings," says Rob. "ChurnZero has naturally driven activity to another level."
- **Increased positive health scores for customers in onboarding.** "We surveyed our latest cohort of newly onboarded customers and every single response was positive," says Rob. "Clearly, the journey is working."



*"Where a CRM is fundamental to a salesperson, ChurnZero is indispensable to a CSM. It's the first thing my team looks at in the morning and the last thing that they look at before they leave. It's a part of our DNA."*

**Rob Wilkinson**

Director of Customer Success | Smoothwall

## How you can start

To find out how you can create a customer-centric onboarding journey and proactive health score program to reduce churn, schedule your demo of ChurnZero today.