GoCanvas increases retention during post-merger integration

The overview

GoCanvas is an industry-leading data collection and analytics company that enables businesses to manage and analyze their processes efficiently from one work management solution. Recently, the company joined forces with Device Magic to expand its offerings and ability to innovate.

Brady James, the vice president of Customer Success, is responsible for the company’s global CSM team. The team is configured into small business, mid-market, and enterprise segments.

The challenges

GoCanvas originally purchased ChurnZero to improve its customer onboarding and health scoring.

“The onboarding processes varied from CSM to CSM,” says Brady. “Each CSM would make an anecdotal decision of when to finish onboarding based on their relationship with the customer—so it was hit or miss for sure.” Health scores were also a “best guess” at the time. The CS team didn’t have direct access to product usage data, making up-to-date health scoring difficult.

After the merger, GoCanvas’ immediate challenge was to get a better understanding of how Device Magic worked with its customers. The team was also focused on defining their processes to enhance the customer experience, and repricing and repackaging their solutions.

“We have different strategies for outreach and engagement across the three different customer segments,” says Brady. “GoCanvas and Device Magic’s customer bases work differently based on their unique product set. But there are best practices that can work for all.”

Beyond that, Brady and the team saw ChurnZero provide opportunities to move to a fully digital approach within their small business segment, improve customer engagement, and quickly identify expansion opportunities.
The process

GoCanvas partnered with ChurnZero to:

- **Make informed business decisions using customer data.** The repricing and repackaging strategy, along with a new customer onboarding and engagement approach were built around product usage, health scores, and customer segmentation. This customer data has brought a new level of insight to departments. The product team can now determine product hits and misses, and the CS team can surface renewal risks and expansion opportunities. “ChurnZero is not only a Customer Success product,” says Brady. “We use its information widely across the business.”

- **Create a tech-touch onboarding that feels personal.** Through ChurnZero’s conditional logic plays, the GoCanvas team transitioned to a fully digital customer onboarding experience for its small business segment that provides a relevant individual experience based on each customer’s product interactions.

- **Measure customers’ health based on their specific context.** To capture the dynamic nature of customer behavior, GoCanvas customizes health scores based on lifecycle phases. “The account management team finds expansion opportunities using adoption scores to identify early adopters who are thriving in onboarding,” says Brady. Scores are then further calibrated by customer attributes, like company size and ARR. For example, the health score for the mid-market/enterprise segment, which has direct CSM interaction, includes CSM sentiment and NPS, whereas the small-business health score (digital-only engagement) focuses more on license utilization. Each score provides a different insight into customers’ adoption and satisfaction with the product.

- **Increase customer engagement and accountability with a centralized communications hub.** The team uses ChurnZero Success Centers to communicate product updates, new tasks, and important information to its small-business market. The rollout was so successful that they plan to implement Success Centers across their entire customer base as their main communications tool.

- **Keep the C-suite in the know.** GoCanvas uses ChurnZero custom dashboards to automatically share executive-level updates and performance snapshots with the CFO and COO on a weekly basis. This real-time data has helped leadership focus on new ideas, streamline processes, support customers, and improve the customer experience.

- **Take what works.** GoCanvas and Device Magic integrated ChurnZero best practices from both teams to ensure accurate health scoring, onboarding, play setup, NPS/CSAT campaign follow-ups, and automation across the entire portfolio. It helped that Device Magic was also a ChurnZero user.
The results

Since using ChurnZero, GoCanvas has seen the following results:

- **33% reduction in average onboarding time**—from 90 days to less than 60 days
- **20%+ increase in gross retention**
- **Significantly improved the health scores** of first-year clients and decreased first-year drop-offs thanks to their new onboarding process
- **Reduced CSM workload** with the creation of a high-impact, tech-touch approach for the small-business segment
- **Improved customer and executive engagement** with more intentional and collaborative communication channels

"By defining and automating aspects of our onboarding process, we’ve increased our gross retention by more than 20%, and it’s continuing to improve. With ChurnZero, the Customer Success team is driving retention."

Brady James  
Vice president of Customer Success | GoCanvas

How you can start

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