Centralized Dashboards Help with Team Efficiencies and Customer Health

The Overview

FiscalNote is a premier software, data and media company that allows their users to pursue opportunities and mitigate risk arising from legislation and regulation.

The platform supports thousands of organizations and utilizes data sourced from around the world. FiscalNote’s mission is to prepare organizations for a rapidly changing world by unifying the work of public, corporate and government professionals.

The Challenges

The FiscalNote Account Management and Customer Success team had the following challenges:

- FiscalNote’s lean Account Management and Customer Success team struggled to keep up with a rapidly growing customer base. Their customer insights were lacking -the team wanted to shift to being more proactive versus reactive.
- The team aimed to better make sense of their data and build a 360-degree view of their customers. Much of this information was siloed in different areas and not easily accessible.
- They lacked an easy-to-use centralized repository to track customer information, account history and overall satisfaction.
- Ensuring CSM touchpoints were completed was a struggle - it was difficult to monitor the completion of these activities.

What FiscalNote Did

FiscalNote and ChurnZero partnered to accomplish following:

- Increase Management Visibility into Customer Health – ChurnZero and FiscalNote identified metrics that accurately scored their customer’s health. Centralizing customer
data allowed the team to stay up-to-date on churn risks and ultimately feel more confident in their account management.

- **Productivity Increases Through Real-Time Alerts** – Alerts enabled the CS team to proactively stay engaged with their accounts. Real-time notifications gave the team insight into churn risks – such as low engagement. Additionally, they were able to easily identify which tasks were open and still needed to be completed by the team.

- **Map Their Customer’s Journey** – Having mapped out their customers’ on-boarding journey, the team is now able to track progress in real-time. By establishing timelines for each milestone (and the journey as a whole,) FiscalNote has benefited from increased visibility during the entire customer onboarding process.

- **Transition from Using ‘Gut Instincts’ to a Strategic Approach** – The team formerly relied on their best guess – an approach that was weak and reactive. Now the team leverages key metrics that gauge their customers’ health and likelihood to renew, allowing them to work more efficiently and proactively.

- **Drive Data-Driven Discussions** – The platform allowed for FiscalNote to access in-depth insights about their accounts and product usage. By doing so they were able to tailor their engagement to make customer conversations more relevant.

**The Impact**

In just over one year, FiscalNote has seen the following results.

- Since implementation their **number of accounts managed have increased from 300 to over 4K clients**. Despite a 6x increase in managed accounts, the CS team has only needed to grow from 10 to 20 employees.

- **Leadership is equipped with better oversight of team activities and outcomes.** Aggregated customer and team reporting allow for trends to be identified and service gaps closed.

- FiscalNote’s team have **realized measurable ROI as a result of their increased retention rate**. Not only has their investment provided a strong return, but the team is better equipped to identify future upsell opportunities.

**How You Can Start**

Through the implementation of a Customer Success solution, FiscalNote unlocked value that not only increased their team’s efficiency, but helped their employees unlock key customer health data.

The solution’s ease of use allowed the FiscalNote team to maximize their actionable insights without taxing internal resources. Doing so has allowed employees to reallocate resources towards ensuring that every customer succeeds.

www.churnzero.net
There’s real power in knowing which customer accounts are succeeding, efficiency at a macro level. If your Customer Success team is looking to scale while still delivering a best-in-class customer experience, consider a tool that can grow along with your company.

ChurnZero’s team of Customer Success Managers are ready to partner with you and help take your department to the next level. If you want to learn more about joining the ChurnZero family please visit https://churnzero.net

“ChurnZero has been huge in providing the data points that we need. As a result, our retention and renewal rates have increased quarter over quarter.”

Liz Friscino
Director of Account Management
FiscalNote