

FreeWill scales with confidence and consistency during 5x ARR growth

F R E E W I L L 

- **27% increase** in logo retention
 - **21% increase** in gross retention
 - **Improved NPS and CSAT scores** during high growth
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The overview

FreeWill builds technology to make the largest and most impactful charitable donations easier for donors to give, and simpler for nonprofit organizations to receive.

The company has three main products and a service offering that fall under its Customer Success team, which it refers to as the partner success team.

Anthony Sottile is the vice president of partner success. His department, which started at six people and quickly grew to 70+ in three years, is made up of six teams: operations, account management, strategy, content, enablement, and innovation. Together, these teams manage more than 1,000 non-profit partners.

The challenges

FreeWill purchased ChurnZero early in its journey of building out a partner success team. Anthony was looking to consolidate account information, make customer data easily accessible, automate manual processes, monitor customer journeys, and measure churn risk.

"All of our customer data was stored in Google Sheets or a CRM," says Anthony. "If a partner raised red flags that they wanted to churn, it was a scramble to find information like their contract details, product use cases, and realized ROI. It was messy and a lot of unnecessary manual work, even with only six people."

Anthony knew this lack of data management made the team far more reactive than it needed to be.

"We invested in ChurnZero earlier than I've seen others invest in a Customer Success platform," says Anthony. "But based on our projections and growth rate, we decided to start using ChurnZero as early as possible, and it paid off."

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The process

FreeWill partnered with ChurnZero to:

- **Systematize and scale the customer and CSM onboarding experience.** The FreeWill team uses automation to increase the consistency and effectiveness of internal activities like CSM training, and external processes such as customer onboarding. "Our onboarding is a complex process that involves a lot of steps," says Kelly Jo Drey, partner success operations team lead at FreeWill. "The new CSMs really appreciate that ChurnZero has everything they need, and automatically reminds them of upcoming tasks and due dates." The team also uses ChurnZero to facilitate smoother client transitions between CSMs.
- **Simplify and measure the performance of workflows, communications, and campaigns.** CSMs use a combination of Plays, in-app messaging, and Success Centers to drive greater accountability and action among account and project stakeholders. "We use Plays as templates for content requests that go back and forth between our CSMs and writers," says Kelly Jo. "It's a huge volume of work, and automating it allows us to generate a tremendous amount of data on the performance of the copy and how and when it's applied." CSMs also use Plays to manage customer-facing initiatives such as survey follow-ups and announcements for new features and beta testing opportunities.
- **Lay a foundation for scalable growth.** The team used ChurnZero to build a digital blueprint for their operations, enabling them to remain agile and respond to rapid business growth and changes. "It was so helpful to set baseline processes using ChurnZero before we started to scale," says Kelly Jo. "The automation and systems we built out in ChurnZero helped us standardize the experience and the service that we offer to our partners."

The results

Since using ChurnZero, FreeWill has seen the following results:

- **27% increase in logo retention** since implementing ChurnZero
- **21% increase in gross dollar retention** since implementing ChurnZero
- **Improved NPS and CSAT scores** through periods of high growth
- **Improved onboarding performance** by quickly surfacing issues using automation and data monitoring
- **Increased the consistency of service** across more than 1,000 customers in 400 segments
- **Streamlined team processes** while scaling from six to 70+ CSMs



"In less than three years, we've grown our team by 10x, our partners by the thousands, and our ARR by 5x. All that growth needs scale, and you can't scale without consistency and centralization. That's what ChurnZero has done for us."

Anthony Sottile

Vice president of partner success | FreeWill

How you can start

To find out how you can scale your customer engagement and experience, [schedule your demo of ChurnZero](#).