

LeanData for Post Sales

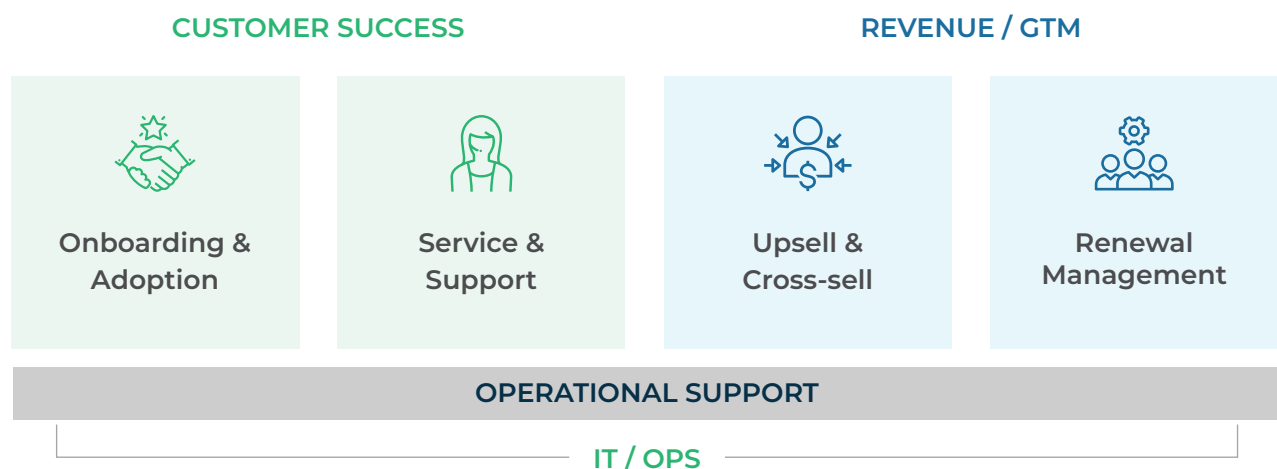
Give your customers a post-purchase experience they will love

Gaining a new customer is just the first step. Keeping that customer for the long haul requires delivering exceptional customer experiences. In fact, according to Forbes, there is an 80% increase in revenue for businesses that focus on improving the customer experience.¹

Exceptional customer experiences rely on smooth and seamless operations. But challenges such as delayed support, inefficient onboarding, poor internal coordination, and mismatched and unaligned customer data can get in the way of delivering the right customer experience. How you overcome these sets you apart from your competition.

Let LeanData Handle the Manual Processes

LeanData does the heavy lifting for you. LeanData dramatically reduces manual efforts by automating processes your marketing, sales and customer teams rely on. It automates action on any data in your CRM including renewals, product usage, and licensing details. With it, you can easily streamline customer events such as assigning and scheduling onboarding tasks, routing help tickets to the right support expert, or alerting the team to upcoming renewal windows. LeanData ensures that post-sales activities are efficient, accurate, and personalized.



¹Shane Smith, "Building A Business By Treating Customers Right," Forbes, 22 March 2024, <https://www.forbes.com/sites/forbesbusiness-council/2024/03/22/building-a-business-by-treating-customers-right/>



Seamless Customer Onboarding

Onboarding and training a wide base of new customers smoothly can strain internal resources and processes. LeanData streamlines and supports the entire process ensuring customers are guided efficiently through each step leading to internal efficiency gains.

- Route and manage onboarding tasks ensuring new customers are set up and trained effectively.
- Automate handoffs and customer account ownership changes between internal teams without disruption to the customer.
- Assign and track onboarding tasks and SLAs so that customers receive necessary guidance and support throughout the onboarding process.



Responsive Customer Support

Today's customers expect immediate resolution. Delays and inaccurate answers lead to frustration and diminished trust. Whether you use a tiered or swarmed support model, LeanData accelerates customer issue resolution.

- Create and manage case routing logic that assigns and escalates cases to the appropriate tier or specialist.
- Efficiently handle support issues with routing, scheduling, and notifications to ensure quick resolution and enhance customer satisfaction (CSAT).
- Automatically match support cases to accounts to provide full context, send notifications, and monitor SLA compliance.



Timely Cross-sell & Upsell Triggers

Customers rarely want to buy more products on your timeline. LeanData helps you promote purchase offers precisely when customers are most receptive, driving additional revenue from the existing customer base and improving the ROI of customer experience programs.

- Automate the identification and management of cross-sell and upsell opportunities.
- Capture and react to customer buying signals present within your CRM's data.
- Proactively engage customers with relevant offers at the right time, based on triggers and buying signals.



Early Renewal & Churn Risk Identification

Most customers don't keep track of renewal dates, but they do remember how satisfied they are with your company. Getting ahead of potential cancellations and renewal opportunities can significantly impact revenues. LeanData enables timely engagement with customers and provides complete context for personalized interactions, helping to strengthen communication and build trust with customers.

- Proactively manage customer renewals by monitoring days from renewal, account health, usage patterns, engagement levels, and buyer intent signals.
- Identify at-risk customers, send automated alerts, and address their needs before renewal periods.
- Automate and streamline account renewal activities, including timely renewal reminders, important customer signals, and internal account-related tasks.



Efficient Operations

Exceptional customer experiences rely on smooth and seamless operations. LeanData enables seamless post-sales operations by connecting data within Salesforce and coordinating data across platforms, automating activities and notifications, and enforcing SLAs to increase efficiency and enhance customer experiences. This means less time wasted on tactical operations and fewer customers slipping through the cracks.

- Automate the management of closed-won opportunities and assignments to the appropriate deal desk, legal, finance, and other teams based on user-defined criteria.
- Streamline the internal processes necessary for finalizing transactions and initiating service delivery, including distributing new customer accounts across customer managers or solution consultants for management.
- Improve the accuracy and effectiveness of lead assignments by automatically processing and routing leads using custom criteria and related data.

"The addition of LeanData has streamlined our operations significantly, ensuring that accounts are assigned to the right reps based on very specific criteria, at the right time. This has helped drive better outcomes at scale, especially for a Success and Implementation team like ours that serves a global market. We benefited greatly in terms of speed, efficiency, and flexibility."

Aaron Dungca,
VP of Merchant Success, Rebuy Engine

Why LeanData?

Today's growth leaders power their B2B selling with LeanData, the gold standard in modern revenue orchestration and an essential element of the modern RevTech stack. The LeanData Revenue Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the plays, people and processes needed to transform buying signals into buying decisions. LeanData is inspiring a global movement among its 1,000 customers and community of 5,000+ Ops Stars worldwide, empowering them with revenue operations excellence that translates into compelling buyer experiences and competitive advantage. Join the movement!

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