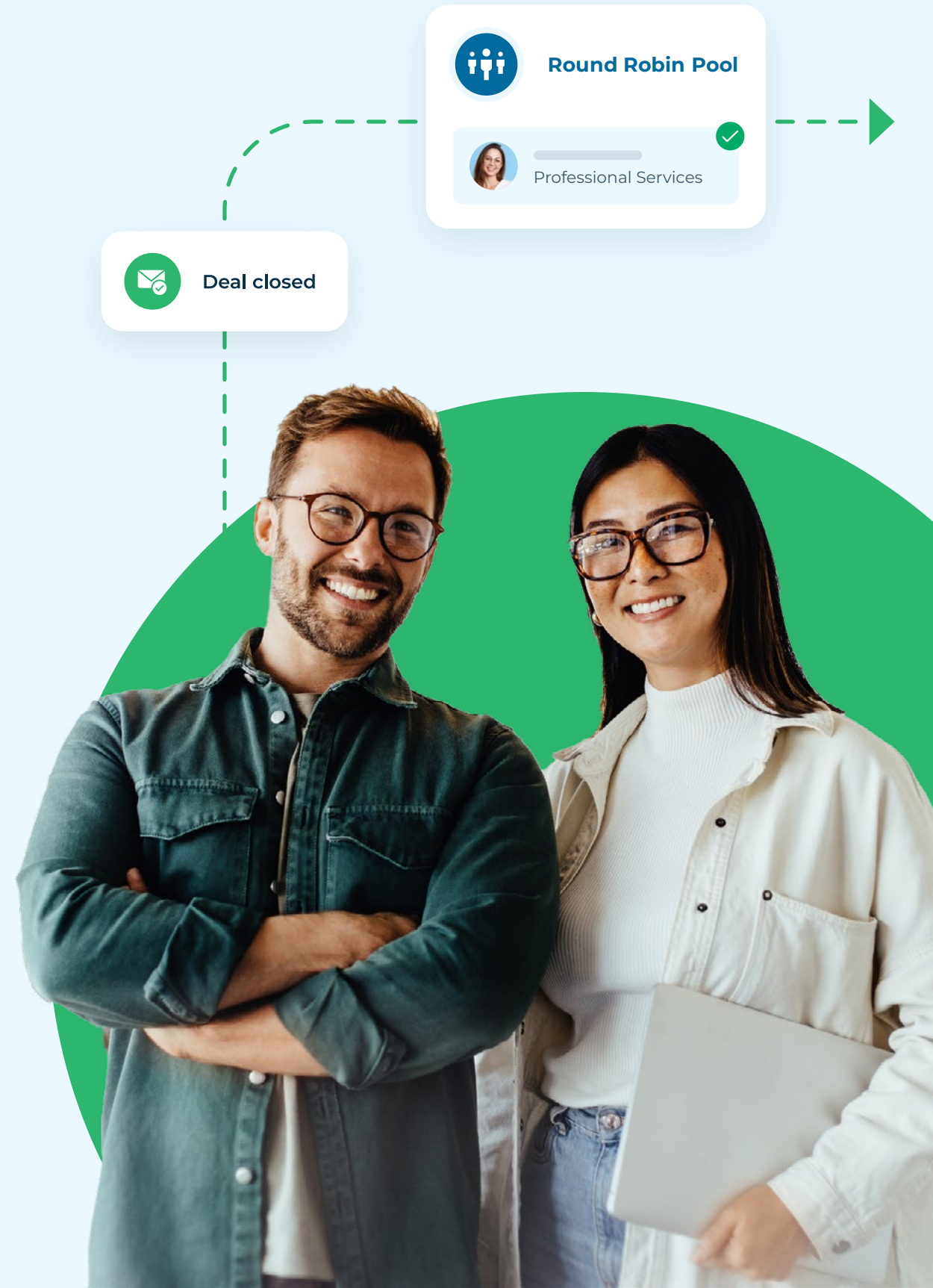


Delivering Exceptional Customer Experiences

Optimizing Post-Sales Operations
with LeanData



Introduction

Winning a customer is just the beginning.

Keeping them is where the real challenge — and opportunity — **begins.**

Delivering an exceptional customer experience is the key to long-term loyalty and revenue growth. Companies that focus on improving customer experience see up to an **80% boost in revenue**, while the cost of acquiring new customers has skyrocketed—up by **over 200%** in the past decade.

Why does this matter? Because happy customers stick around, buy more products, and tell their friends. That's why retention, upselling, and cross-selling are top priorities for businesses looking to grow revenue. But here's the catch: while some industries have made strides in customer experience, many still lack the tools to truly deliver.

That's where LeanData comes in.

From onboarding to support and renewals, LeanData helps businesses streamline operations, automate processes, and respond to customer needs faster, **creating satisfied, loyal customers who spend more.**

This guide showcases how to deliver exceptional customer experiences through the power of LeanData orchestration.

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PART 01

Post-Sales Essentials: Roles, Challenges, and Keys to Customer Loyalty

Why Post-Sales Operations Really Matters

In a competitive market, post-sale operations are essential for maintaining a loyal customer base and maximizing the long-term value of each account.

Here are the top five reasons post-sales success **really matters** ----->

1

Customer Retention and Loyalty

Effective post-sales support ensures customers remain satisfied with their purchase, which is crucial for retaining them and encouraging repeat business.

2

Customer Satisfaction

High-quality post-sales service can significantly enhance the overall customer experience, leading to positive reviews and word-of-mouth referrals.

3

Operational Efficiency

Streamlined post-sales processes improve the efficiency of support teams, reducing resolution times and operational costs.

4

Upselling and Cross-Selling Opportunities

Engaging with customers post-purchase provides opportunities to introduce additional products or services, thereby increasing revenue.

5

Brand Reputation

Providing exceptional post-sales service builds a strong brand reputation, making it easier to attract new customers.

A sub-par customer service will drive away **23.5%** of loyal customers.

Source: Yotpo

About **50%** of consumers would switch to a competitor after one bad customer experience.

Source: Zendesk

59 percent of customers reported once they are loyal to a brand, the brand has their loyalty for life.

Source: Acquia

Post-Sales Personas: Who's Responsible?

A variety of roles within a company come together to make sure the post-sales experience is smooth and successful. These personas will need to work closely together, aligning strategies, tools, and processes in order to deliver a seamless customer experience.

Therefore, it's important for companies to clearly establish post-sales roles and responsibilities, and develop effective workflows that support collaboration and maintain transparency across teams.

While titles and responsibilities may vary across organizations, here are the key players and teams typically responsible for driving the success of post-sales efforts.



Revenue Leadership

Sales | AE | AM | Commercialization

- Often responsible for customer retention revenue (NRR) and upsell revenue



Customer Success

Customer Support | Tech Support | Account Management

- Responsible for customer satisfaction scores (NPS), onboarding, and support
- May contribute to or carry an NRR/upsell quota



Operations

Sales Ops | IT | Salesforce Admin | Business Analyst

- Support customer experience operations and have the ability to drive retention and/or renewals
- May be responsible for SLA management, renewal/upsell/cross-sell reporting, customer account signals and profile completeness within the customer record
- Responsible for building and supporting the post-sale business rules

Common Post-Sales Challenges

After gaining a new customer, businesses often encounter post-sales challenges like onboarding and support inefficiencies, which can affect customer satisfaction and smooth operations.

Here are the **five most common post-sales hurdles**:

Timely & Effective Support

Delays or mistakes when helping customers can leave them frustrated and lose trust in your business.

1

Managing Customer Onboarding & Training

Handling a large and diverse customer base can overwhelm your team and stretch resources thin.

2

Evolving Customer Needs

As customer needs change, your post-sales processes need to keep up to meet their expectations.

3

Seamless Internal Coordination

For smooth customer experiences, your support and account teams need tools that help them work together to deliver a unified customer experience.

4

Measuring Post-Sales Activities

When systems don't sync up, it's harder to see what's working and where you can improve.

5

5 Keys to Building Customer Loyalty

The following table outlines the top five post-sales customer needs that are the **building blocks of customer loyalty**:

| Your Organization Must Deliver → |  Seamless Onboarding |  Effective Service & Support |  Strategic Expansion Opportunities |  Consistent Care & Engagement |  Streamlined Support |
|-----------------------------------|---|---|--|--|---|
| How to get it done | Efficiently guide new customers through setup and implementation. | Provide timely and effective customer support by quickly routing inquiries to the appropriate support tier or specialist. | Provide timely and relevant upsell or cross-sell offers that clearly show added value, aligned with your customers' current needs. | Actively manage the relationship by regularly monitoring account health, usage patterns, and engagement before renewal periods. | Simplify post-sales operations by getting your customer success, support, and account management teams working together seamlessly. This means connecting data across platforms, automating repetitive tasks, and keeping communication clear and easy. |
| How your business benefits | Effective onboarding accelerates the time it takes for customers to realize value, boosts their overall satisfaction, and fosters stronger, long-term engagement with your product. | Responsive service and support improve customer satisfaction, reduce churn, and build brand trust. | Identifying the right offer at the right time increases the opportunities for revenue growth from your existing customer base. | Maintaining regular communication, providing value, and addressing concerns promptly, improves customer loyalty and maximizes renewal rates. | When processes are efficient, everything runs smoother, mistakes are reduced, and both teams and customers enjoy a consistently positive experience. |

PART 02

Exceptional Customer Experiences with LeanData



Five Ways LeanData Supports Post-Sales

When companies use LeanData to support their post-sales efforts, it streamlines operations through automation, which has a big impact on how customers interact with them.

Here are five ways that LeanData supports post-sale needs and enables businesses to deliver exceptional customer experiences.



Seamless Customer Onboarding

LeanData's automated workflows handle task assignments, track progress, and offer support, resulting in faster adoption, better engagement, and increased customer satisfaction.

Responsive, Effective Service & Support

LeanData will efficiently route inquiries to the right specialist, ensuring faster and more accurate issue resolution. This leads to higher customer satisfaction and reduced churn, while also building trust and loyalty through responsive service.

Efficient Operations

LeanData enhances post-sales operations by integrating data across platforms, automating routine tasks, and ensuring clear communication channels.

Timely Upsells & Cross-Sells

LeanData helps companies identify upsell and cross-sell opportunities by capturing early account signals and customer data. This allows teams to offer relevant products at the right time, increasing revenue from existing customers through automated account expansion activities.

Maximize Renewals

LeanData helps companies manage customer renewals by tracking account health, usage, and engagement. It identifies at-risk customers early and addresses their needs before renewal. Automated processes streamline renewal management, ensuring long-term customer relationships.

3 Ways to Measure the Value of LeanData

Here are the three most common ways our customers measure the ROI of LeanData:

Overall reduction in operational expenses as internal resources become more efficient and less time is wasted on tactical operations.

1

Increases in net revenue retention (NRR), revenue expansion, and customer satisfaction (CSAT) directly tied to improved speed and accuracy of customer support efforts.

2

Improved ROI on customer retention/upsells and customer experience programs through better operations flow and spend attribution.

3

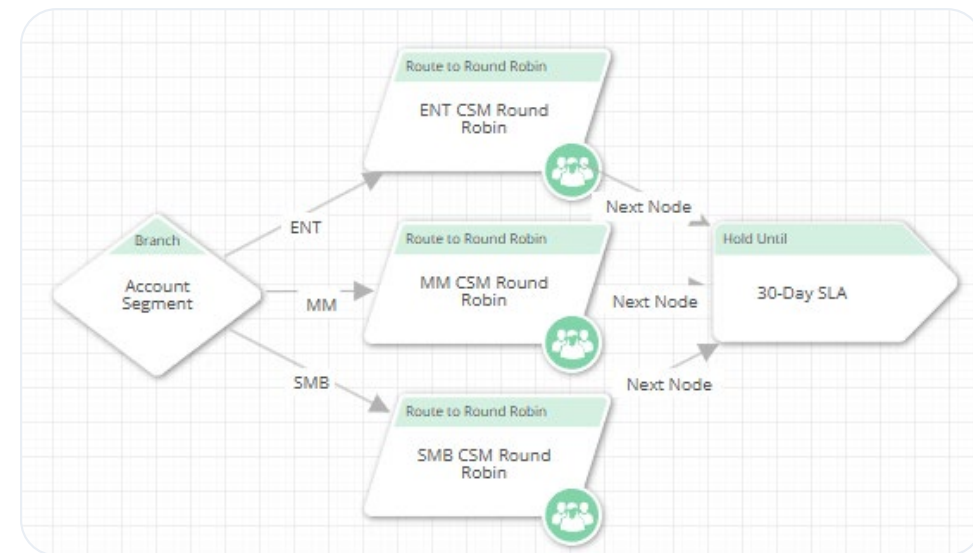
PART 03

LeanData Use Cases for Post-Sales



Onboarding

Assign, route, schedule, and manage onboarding tasks to ensure new customers are set up and trained.



How we support

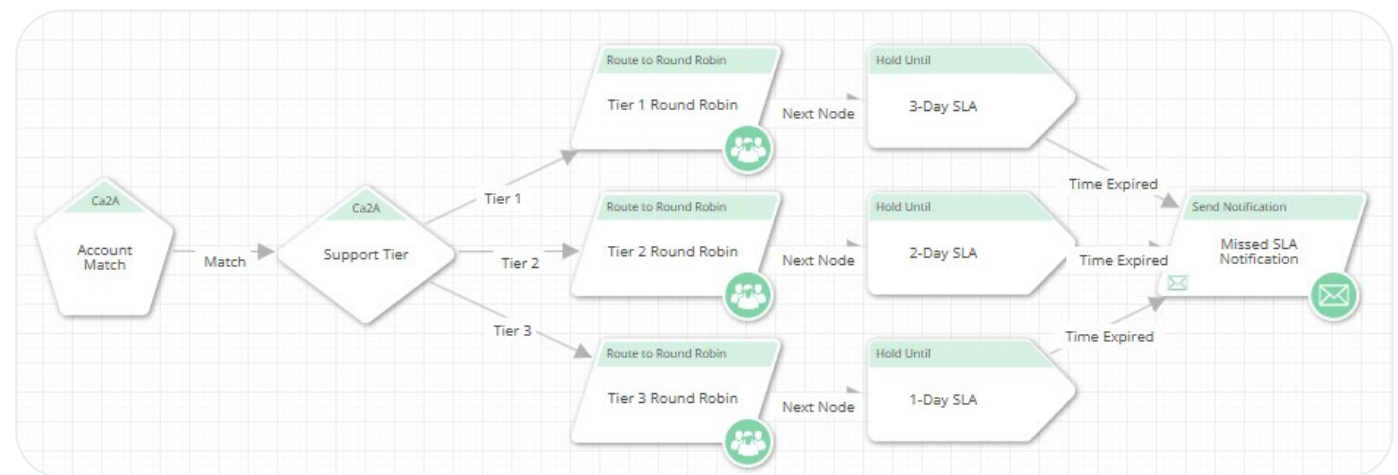
- Automate Sales to Customer Success handoffs and account ownership changes
- Assign onboarding tasks among Implementation/ Customer Success teams
- Track SLAs around onboarding tasks

Successful outcomes

- Make sure onboarding tasks get done on time
- Help customers get up and running quickly to see value faster
- Build strong connections between customers and their CSMs right from the beginning
- Boost product usage and adoption

Tiered Support

Quickly route and escalate support issues to get them resolved fast and ensure customer satisfaction.



How we facilitate

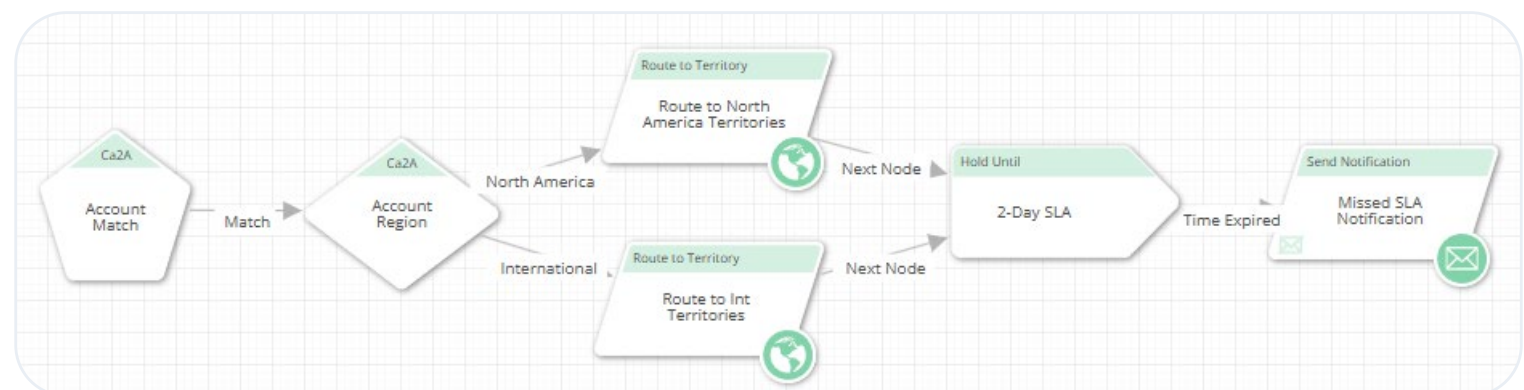
- Create and manage case routing logic that assigns and escalates cases based on the level of support needed (tier)
- Match cases to accounts to provide full context
- Send notifications around customer issues
- Monitor SLA compliance

Successful outcomes

- Respond faster to high-priority cases
- Resolve customer issues more quickly
- Get the right support level on customer issues right away
- Minimize downtime
- Make the overall customer experience better

Swarming (Pooled) Support

Quickly send support issues to the right teams so they can be resolved faster, keeping customers happy.



How we facilitate

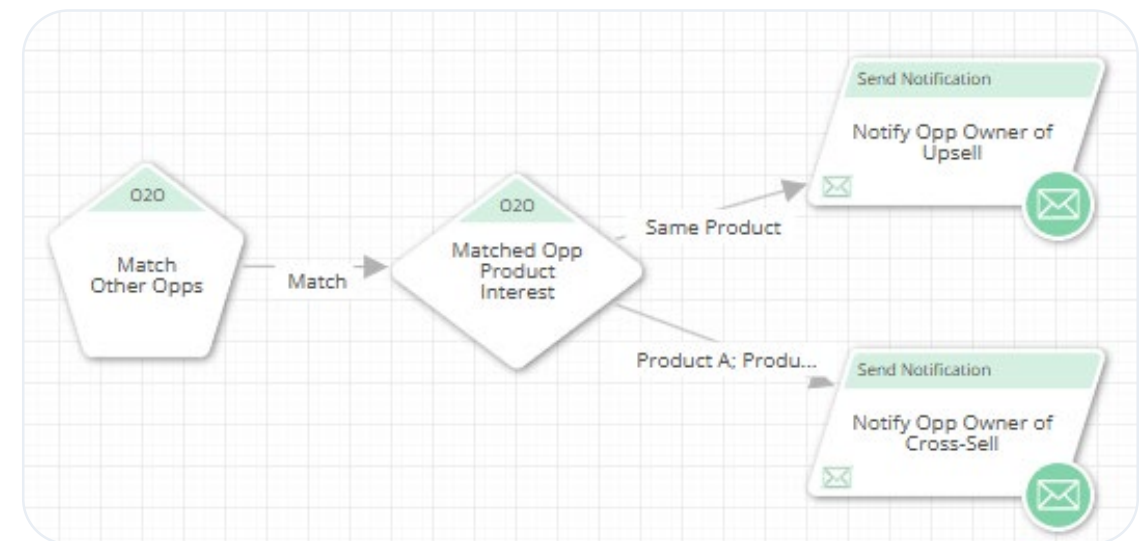
- Create and manage case routing logic that routes cases to teams based on the set criteria (e.g., case subject, product line, territory)
- Match cases to accounts to provide full context
- Send notifications around customer issues
- Monitor SLA compliance

Successful outcomes

- Resolve customer issues quickly
- Provide a seamless customer experience

Account Expansion

Automatically identify and manage cross-sell and upsell opportunities to grow customer accounts.



How we support

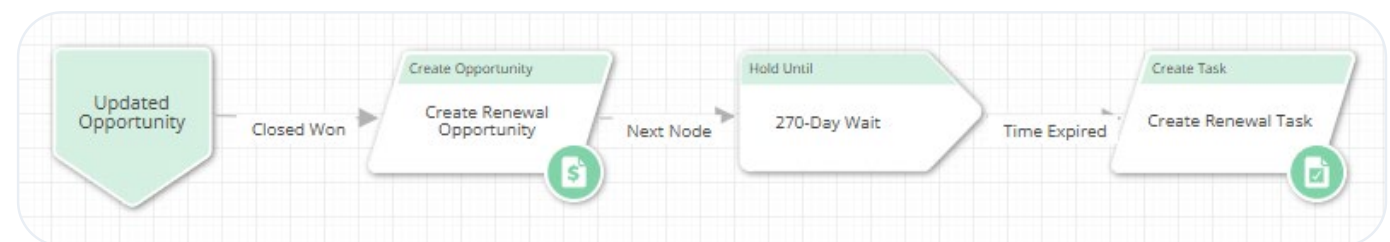
- Capture buying signals and identify cross-sell and upsell opportunities
- Qualify opportunities and alert teams to important tasks
- React to and manage cross-sell and upsell opportunities

Successful outcomes

- Connect with customers at the right time with offers that matter
- Grow accounts efficiently and proactively
- Increase revenue

Renewal Automation

Proactively manage customer renewals by automating tasks and sharing timely, useful info.



How we support

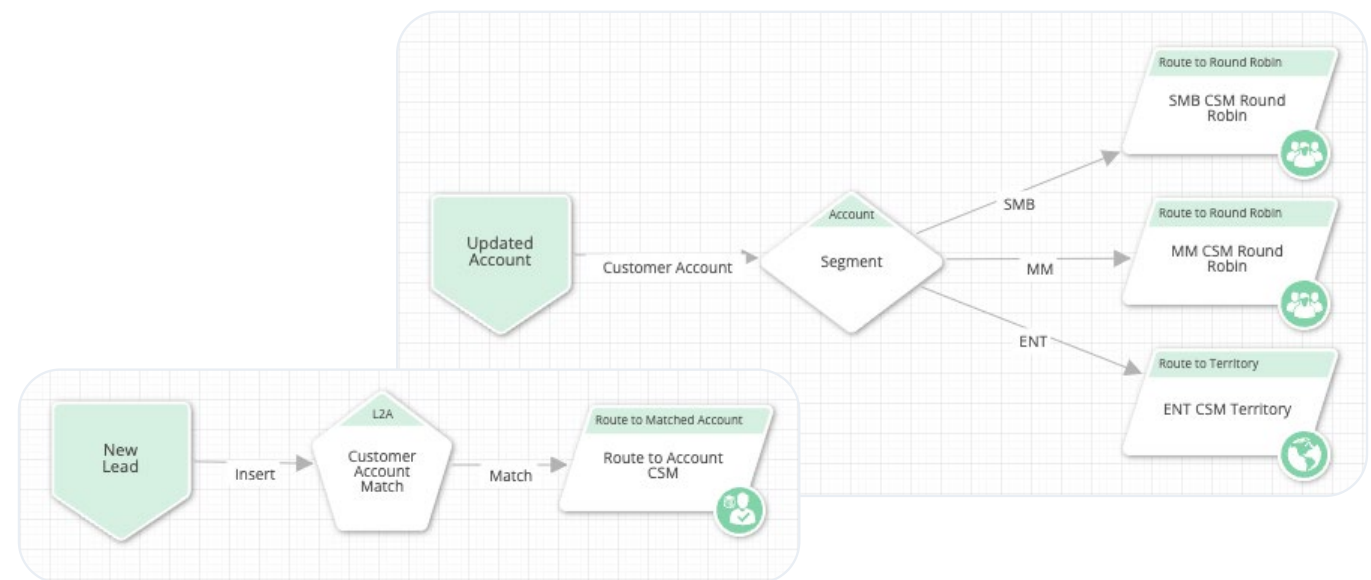
- Automate renewal activities and account-related tasks
- Alert teams of important signals with complete context
- Send notifications and reminders around renewals

Successful outcomes

- Deliver timely and personalized engagement with customers
- Strengthen communication with customers and build trust
- Boost customer retention

Deal Management

Manage the assignment and follow-up of closed deals to streamline the internal processes necessary for finalizing transactions and initiating service delivery.



How we facilitate

- Identify signals from new and existing points of contact in owned accounts
- Advanced matching algorithm improves the accuracy and effectiveness of assignments
- Automatically route any new leads and contacts from customer accounts using custom criteria and related data

Successful outcomes

- Ensure the right person is engaged with each account at every point of the customer journey
- Improve response times
- Increase overall sales efficiency by minimizing delays and bottlenecks in any post-sales revenue process

PART 04

LeanData Customer Success Stories



Rebuy Automates Customer Onboarding with LeanData

Rebuy uses LeanData to **replace highly manual processes** being used for account matching, customer onboarding routing and scheduling, and round-robin assignments from the BDR team to customer (merchant) success.

With LeanData, Rebuy has **automated handoff and routing between teams**, including from sales to customer success (merchant success) and from partnership team to sales.

They also created automatic workflows that **trigger based on customer activity**. These cover items such as when a customer installs, reaches certain usage thresholds, when accounts are showing growth potential or hitting specified revenue points.

Each has an **automatic flow with alerts** routed to the appropriate merchant success or growth team members.



“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

Global Tech Company Accelerates Customer Support with LeanData

A global technology company uses LeanData to **accelerate the routing and escalation of customer technical support tickets**. Streamlined and automated processes ensure customer issues are handled quickly, by the most appropriate subject matter experts (SME).

Service Level Agreements (SLAs) prioritize certain types of cases, ensuring prompt resolution by SMEs. This **comprehensive routing system** includes categorizing cases by type, origin, and product category, supporting the company's global support network, including outsourced teams.

When a customer encounters a technical issue:



A case is created and routed to the appropriate queue or engineer based on account details, product category, and territory segmentation.



New cases are initially triaged in the appropriate queue, then assigned directly to an engineer.



Cases are escalated to higher level queues as necessary, depending on product categories, support levels, and territories.



How LeanData's RevOps Team Boosts Renewals and Upsells

Yes, we drink our own champagne.

LeanData's internal RevOps team uses LeanData as part of our customer renewal and upsell motions.

Depending on the date and stage of the renewal, LeanData will **trigger alerts and tasks** for the account manager (AM), such as customer usage, support tickets, customer news, etc. In this way the AM can **personalize their communications**.

Additionally, LeanData automation **looks for accounts that are at risk of churning** based on fields or criteria in Salesforce. Then, LeanData bubbles those renewal opportunities up to AM leadership through **Slack and email alerts**.

LeanData also **monitors G2 buyer intent** to identify upsell opportunities and churn risks.

When someone researches LeanData or competitors on G2:



LeanData automation creates a new record for the G2 activity



Matches it to an existing account



Sends a Slack alert to the AM based on what the customer researched and what products they already have



PART 05

Conclusion



Let LeanData Handle the Manual Processes

LeanData does the heavy lifting for you.

Our platform dramatically reduces manual efforts by automating processes your marketing, sales and customer teams rely on.

It automates action on any data in your CRM like renewals, product usage, and licensing details. 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.

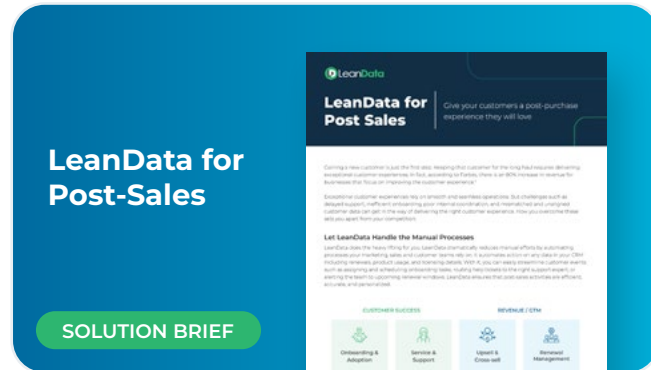


Want to see LeanData in action?

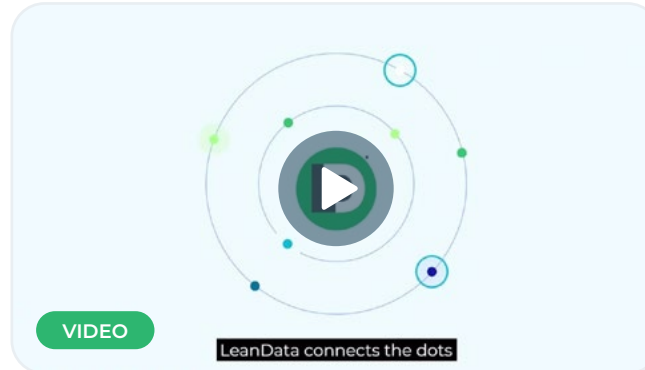
Reach out for a demo today.

Request Demo

About LeanData



LeanData for Post-Sales



LeanData Demo in 100 Seconds



Rebuy Scales Revenue Operations with the LeanData Platform

Get Started Today

Visit [LeanData.com](https://www.leandata.com) to learn more about LeanData's go-to-market operations solutions for Automated Scheduling, Matching, Routing and Buying Groups, or visit us on [AppExchange](#).

[Request Demo](#)

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+ OpsStars worldwide, empowering them with revenue operations excellence that translates into compelling buyer experiences and competitive advantage. Join the movement!