

5 Reasons You Should Run Your Customer Success on Salesforce



Customer Success has changed. And that means changing how we work.

The march towards subscription-based models has fundamentally altered the relationship between businesses and their customers.

No longer focused solely on one-time transactions, businesses need to prioritize ongoing customer satisfaction to maintain revenue streams over the long term. In fact, research has shown that existing customers are likely to be a more **cost-effective way to grow your organization** than new customers, particularly for B2B organizations.

Businesses are recognizing the economic benefits of focusing on customer retention and expansion. We all know that satisfied customers are more likely to make repeat purchases, spend more over time, and even advocate for your brand. By prioritizing Customer Success, organizations can drive revenue growth, improve profitability, and build a sustainable competitive advantage in the market.

Okay, but what has Salesforce got to do with it?

...let's start by following the data!

Customer Success has evolved from a reactive support function to something more proactive and strategic. In today's more customer-centric era, organizations that prioritize and excel at delivering value throughout the customer lifecycle are more likely to get that all-important competitive advantage.


Advancements in technology have also provided businesses with valuable insights into customer behavior and preferences thanks to the sheer volume of data available.

Leveraging these insights allows organizations to anticipate needs, personalize interactions, and proactively address issues, thereby enhancing the overall customer experience and fostering long-term loyalty.

Data can often sound like a buzzword. Sadly, for many organizations, it is.

In order for data to be useful, it has to be used effectively. But to use it? First you need to find it!





If you want your Customer Success team to have the most up-to-date information and insights on their key accounts, they need to run their Customer Success from **where the data is: Salesforce.**

1. 360-Degree View of Customers

Let's start with the basics:

With a single, shared view of your customers, all your teams can better meet the demands of your customers.

Salesforce defines customer 360 as a way to 'give everyone in your company a single, shared view of your customers.' This means that all teams, regardless of their function, can collaborate seamlessly, allowing for the delivery of personalized experiences that resonate with customers and lay the groundwork for enduring, trusted relationships.

One team, one platform

You might even need to change the mindset of your organization to make it work, but getting all teams working from the same page - or, quite literally working from the same place (Salesforce) - is going to give your team and your customers a better experience.

All too frequently organizations are managing Onboarding, Services, & Success through multiple, disparate platforms. And that can mean crossed wires internally, and fragmented, frustrating journeys for your customers externally.

A true customer 360 empowers companies to break down silos and leverage a single, shared source of truth about their customers across departments, from marketing and sales to service and IT.

Salesforce offers a comprehensive view of each customer, including their purchase history, support tickets, communication history, and engagement metrics. This holistic view enables customer success teams to understand customer needs and behaviors better, allowing for more targeted and proactive support.

Linking Sales and Service Clouds, while reducing handoffs

One key aspect of Customer 360 is the integration between Sales and Service Clouds. Effective customer relationship management necessitates a unified approach that connects the entire business around the customer, spanning sales, service, marketing, IT, and analytics.

Projects play a pivotal role in bridging the gap between these two essential components - and using the right Salesforce tool or app to make this journey seamless is essential.

Think about the efficiency of your internal data exchanges.

Your Sales team has been working on an opportunity for several months. When the deal is successfully closed, how are your Onboarding, Services and Success teams notified? With so much data already stored in your CRM, moving that vital project context seems counterintuitive. And yet, that's what many organizations do. Information is transferred to an Onboarding tool. And then a Success tool, and so on...

For the best customer experiences, it's vital you're using the same system for sales, onboarding and services.

Managing customer projects using Salesforce means you can easily log, manage, and analyze all customer activity in one place. The Salesforce platform provides an ecosystem of fully connected mobile and social tools all powered by the cloud, with Customer 360 at the heart.

With Sales Cloud and Service Cloud working in tandem on the same platform, your business can keep up with the speed, innovation, and connectivity that produces great customer experiences leading to customer loyalty. By connecting all of your data, you can build 360-degree views of each customer and provide seamless interactions across any channel or department.

With Salesforce, you can turn opportunities into a project with a single click. No loss of data, and nobody needs to leave the Salesforce platform.

Ultimately, Customer 360 empowers teams to create tailored, relevant customer experiences by providing access to critical customer data, including needs, history, interests, and pain points. By onboarding with the Salesforce platform, account managers can access up-to-date information ahead of any customer interaction, ensuring informed and personalized engagement.

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2. Grow your company's revenue

Managing customer success through Salesforce can grow revenue by fostering long-term customer relationships through personalized engagements and proactive support, leading to increased customer retention, expansion opportunities, and higher lifetime value.

Additionally, Salesforce's comprehensive analytics and reporting capabilities help businesses to identify and capitalize on revenue-generating opportunities within their existing customer base while optimizing resource allocation for maximum profitability.

Seamless integration with opportunities

Integrating Salesforce with opportunities streamlines the sales process, enabling sales teams to manage leads, track opportunities, and close deals more efficiently. By seamlessly linking opportunities with customer data, sales reps gain insights into each prospect's preferences, purchase history, and interactions with the company.

This integration facilitates targeted sales efforts, personalized messaging, and timely follow-ups, ultimately increasing the likelihood of conversion. Additionally, by automating workflows and notifications, Salesforce ensures that no opportunity falls through the cracks, maximizing sales productivity and revenue generation.

Customer expansion leads through Salesforce

Salesforce enables businesses to identify and capitalize on opportunities for customer expansion. By leveraging data analytics and AI-driven insights, companies can uncover cross-selling and upselling opportunities within their existing customer base. Salesforce's robust CRM capabilities allow sales teams to segment customers based on various criteria, such as purchase behavior, demographics, or engagement level.

Armed with this information, sales reps can tailor their approach, offer relevant products or services, and nurture relationships with existing customers, driving incremental revenue growth.

If you'd like to read more, we've written a whole eBook on the subject! [You can find it here.](#)

Unified reporting to see true account profitability

Salesforce provides unified reporting capabilities that offer visibility into account profitability across the organization. By consolidating data from sales, marketing, service, and finance departments, businesses can gain a comprehensive understanding of each customer's lifetime value and contribution to the bottom line. Salesforce's customizable dashboards and reports allow stakeholders to track key metrics, such as revenue per account, customer acquisition cost, and retention rate, in real-time.

This visibility enables informed decision-making, resource allocation, and strategic planning to optimize account profitability.

Salesforce's predictive analytics capabilities can also forecast future revenue streams, identify potential risks, and recommend actions to maximize account profitability over time.



3. Centralized Data Management

Salesforce's centralized data management plays a pivotal role in helping customer success teams to deliver exceptional experiences and drive revenue growth. At the heart of Salesforce's value proposition is its ability to serve as a comprehensive repository for all customer-related information.

From interactions and preferences to feedback and purchase history, Salesforce offers a unified platform where every detail of the customer journey is captured and stored securely. This centralized approach ensures that customer success teams have a holistic view of each customer, enabling them to understand their needs, anticipate their preferences, and tailor their interactions accordingly.

Keeping it real

One of the key benefits of Salesforce's centralized data management is its ability to provide customer success teams with access to accurate and up-to-date information in real-time. By eliminating data silos and fragmentation, Salesforce ensures that teams have a single, reliable source of truth at their fingertips.

This accessibility to timely and precise data is essential for delivering personalized and effective support to customers. Whether addressing inquiries, resolving issues, or proactively engaging with customers, having access to the right information at the right time enables customer success teams to build trust, foster loyalty, and drive satisfaction.

Sharing the love

Salesforce's centralized data management facilitates collaboration and alignment across the organization. By providing a shared platform where sales, marketing, service, and other teams can access and contribute to customer data, Salesforce breaks down organizational barriers and fosters cross-functional synergy.

This collaboration enables customer success teams to leverage insights from other departments, such as sales forecasts or marketing campaigns, to better understand customer needs and deliver value-added solutions. Ultimately, Salesforce's centralized data management empowers customer success teams to be more efficient, proactive, and strategic in their approach, driving sustainable growth and success for the business as a whole.



4. Automation and Workflow Management

Salesforce's robust automation and workflow management capabilities can serve as a lifeline for busy teams, ensuring they can streamline processes, prioritize tasks, and focus on what truly matters: building lasting relationships and driving customer satisfaction.

Streamlining routine tasks

Salesforce's automation capabilities serve as a force multiplier for customer success teams by streamlining repetitive tasks and workflows. Tedious onboarding processes, for example, can be automated using Salesforce workflows and process builder, ensuring that new customers receive a seamless and consistent experience from the moment they sign up.

Similarly, renewal reminders can be automated, triggering timely notifications to both customers and account managers, thereby reducing the risk of missed renewals and revenue loss. Salesforce's automation tools can identify upsell opportunities based on predefined criteria, such as usage patterns or product preferences, and automatically notify sales or customer success representatives, enabling proactive engagement and revenue growth.

More time to add real value to your customers

By automating routine tasks and workflows, customer success teams can allocate more time and resources to the high-value activities that drive customer satisfaction and loyalty. Rather than being bogged down by manual data entry or administrative tasks, customer success representatives can concentrate on building meaningful relationships with customers, understanding their unique needs, and delivering personalized solutions.

5. Data Insights and analytics

Data is useless if it can't be viewed in an easy-to-digest way.

Salesforce offers customizable dashboards and reports that serve as indispensable tools for customer success teams, meaning teams can track key performance indicators (KPIs) and gain actionable insights into customer interactions, satisfaction levels, and overall success metrics.

Customizable dashboards

Salesforce allows customer success teams to create tailored dashboards that display relevant KPIs and metrics in real-time.

These dashboards can be customized to reflect the unique goals and objectives of the team, providing a visual representation of critical data such as customer health scores, churn rates, and retention metrics. By consolidating key information in a single, easy-to-access interface, customizable dashboards, teams can monitor performance at a glance and identify trends or areas that require attention.

Some of the more sophisticated Salesforce-native Customer Success solutions can allow you to see customer scorecards, view all of your account trends from a single view, and even allow you to manage your stakeholders from one place.

Dynamic reporting

Salesforce's reporting capabilities ensure customer success can generate detailed, customizable reports that delve deeper into specific aspects of customer engagement and satisfaction. Whether it's analyzing customer feedback, tracking product usage patterns, or assessing the effectiveness of support interactions,

Salesforce's dynamic reporting tools offer unparalleled flexibility and granularity. Teams can create custom reports with filters, groupings, and visualizations tailored to their unique needs, allowing for comprehensive analysis and informed decision-making.

For customer success teams, Salesforce offers powerful analytics and reporting features to monitor key metrics, spot trends, and gauge the impact of their actions. By leveraging insights from Salesforce data, teams can make informed decisions and refine their strategies to enhance customer success continually.



What next?

With its centralized data management, customizable dashboards, and robust automation capabilities, Salesforce empowers customer success teams to deliver exceptional experiences and drive revenue growth.

By leveraging Salesforce's insights and analytics, teams can anticipate customer needs, address issues proactively, and continuously improve their strategies.

So, you've taken a look at how using Salesforce for customer success could be the right step for your organization. The next question you need to explore is: how do I make that happen?

Turn your customer success teams into a growth engine with Cloud Coach. Plan, execute, and iterate your most crucial delivery processes with the highest-rated Customer Onboarding, Customer Success & PSA solution native to Salesforce.

If you would like to find out how we can help transform your customer success operations, contact us at sales@cloudcoach.com