CHURNZERO

Getting Started with ChurnZero Journeys

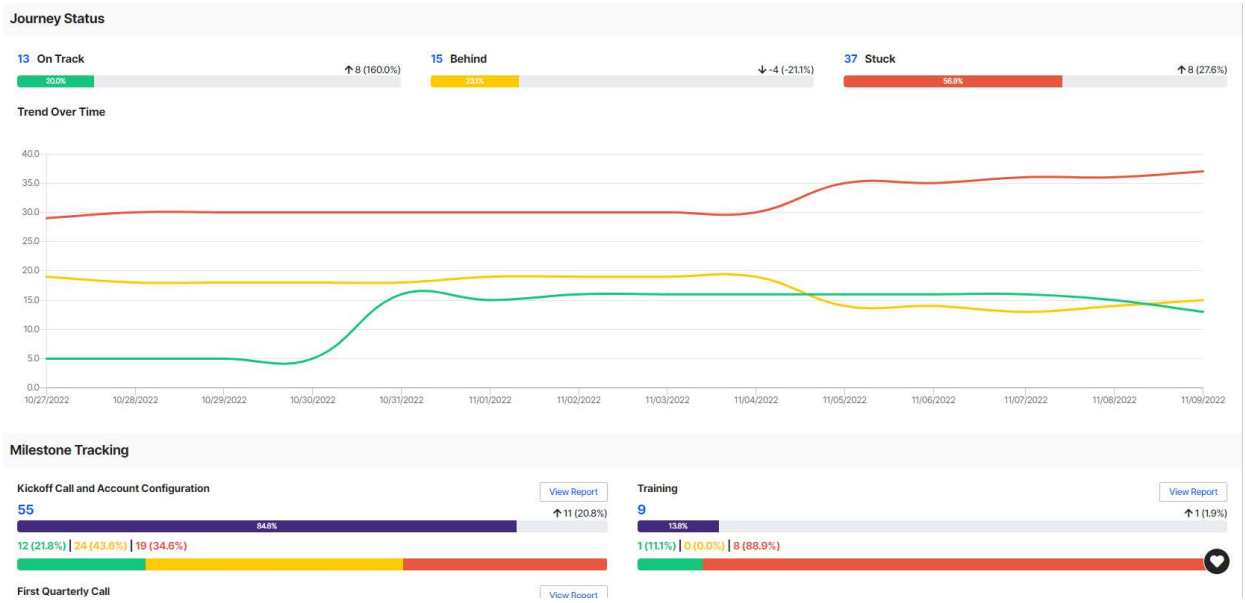


What Is a Journey?

A Journey is a map of a process that your customer completes to achieve key goals throughout their customer lifecycle. Journeys outline clear expectations of what is needed from both your internal team and your customers. Within each Journey, you can define Milestones, Tasks, and Achievements to guide customers through your processes with ease and efficiency. Example of customer journeys include customer onboarding, expansion, renewal, and advocacy.

ChurnZero Journeys 101

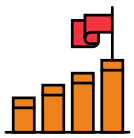
- **Milestones** are defined phases within a Journey comprised of time-bound Tasks and Achievements. Milestones represent deliverables or events that are essential to the Journey's completion, such as the requirements gathering phase during customer onboarding.
- **Tasks** are internal action items that your team must complete to progress customers through their Journey, such as scheduling the customer welcome call to kick off requirements gathering.
- **Achievements** are items that your customer completes to move through the Journey, such as "Log in for the first time" or "Get data successfully flowing into the system."



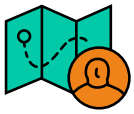
A Better Way to Manage Your Customers' Journey



Simplify workflow management.
Reduce manual mistakes, align customer and internal team expectations, and ensure process consistency across all customer journeys.



Fast-track customer momentum.
Stay on top of deadlines, customer touchpoints, and outreach opportunities with automated reminders for Journey Milestones, Tasks, and Achievements.



Get a comprehensive view of progress.
Always know the status of your customer journeys—whether they're on-track, behind, or stuck— for a contact, an account, or an entire book of business. If a customer begins to lag, quickly isolate the cause and course correct using real-time Journey insights.



Guide customers with ease.
Automate customer-facing Journey status reports to keep customers on target and on time with their tasks and goals.



Make your journey rewarding.
Continuously improve the customer journey and prioritize critical enhancements by uncovering trends, inefficiencies, and roadblocks in their lifecycle.

How to Use ChurnZero Journeys

Understand, design, and improve customer experiences with your product and your Customer Success team using Journeys. See how Journeys create a repeatable and scalable roadmap for every customer experience.

Onboarding Journey Use Case

Customer retention and churn prevention start at the beginning of a customer's journey with your company during onboarding. The initial interactions between your customer, your product, and your Customer Success team establish the groundwork to jumpstart success (or accelerate failure). Setting timelines and tracking progress for important milestones establishes clear expectations for your internal and external processes and drives a successful onboarding.

Customer Onboarding Journey Example

MILESTONE #1	MILESTONE #2	MILESTONE #3	MILESTONE #4
1-10 Days **Requirements**	*11-20 Days* **Configuration**	*21-30 Days* **Training**	*31-45 Days* **Go-Live**
Task • Welcome call with customer POC	**Task** • Integration documentation sent	**Task** • Train customer POC	**Task** • Congratulate customer on launch
Achievements • Document goals	**Achievements** • Integration complete	**Achievements** • POC is proficient in your software	**Achievements** • Active usage by your customer

Adoption Journey Use Case

After you successfully onboard a customer, the next stage in the lifecycle is to encourage meaningful customer engagement to drive user adoption. You can increase customer satisfaction and retention rates by ensuring your customers get the most value out of the features and functionality.

Product Adoption Journey Example

MILESTONE #1

1-10 Days / Post Onboarding

Initial Adoption



Task

- New Journey expectations call with POC & Exec

Achievements

- Confirm active usage baseline from onboarding

MILESTONE #2

11-30 Days / Post Onboarding

Engagement & Support



Task

- Set regular meetings
- Confirm customer access to support and knowledge base

Achievements

- One or more logged activities or messages in the last 7 days
- (Optional) One or more support tickets submitted

MILESTONE #3

31-45 Days / Post Onboarding

Full Adoption



Task

- Identify potential areas for upsell next quarter

Achievements

- Active usage by your customer to the full value standards
- Active usage of stickiest features to the minimum standard

Advocacy Journey Use Case

Customer advocates help you attract more customers, grow your community, and increase your retention. Once a customer fully adopts your product and becomes a power user, it's time to use their influence to sing your praise and share their success.

Customer Advocacy Journey Example

MILESTONE #1

1-10 Days / Post Adoption

Initial Request



Task

- Confirm that customer would be a good candidate to submit review

Achievements

- Confirm active usage of product
- Confirm Promoter NPS score

MILESTONE #2

11-20 Days / Post Adoption

Secondary Request



Task

- Post social media promoting customer (blog, review, company)

Achievements

- Confirm initial review submitted

MILESTONE #3

21-30 Days / Post Adoption

Case Study Request



Task

- Confirm that customer would be a good candidate for a referral or case study
- (Optional) Post case study on social media to give customer visibility

Achievements

- Confirm at least one review was submitted

ChurnZero Boost:

Strengthen your customer health monitoring by connecting Journeys to ChurnZero's most popular features, such as Plays, Alerts, and ChurnScores. Create a unified view of customer progress, so you can quickly adapt to changes in customer behavior and context. Use your customers' Journey data to:

- Automatically add a customer to a segment for further analysis or to a Play for targeted engagement and nurturing
- Get instantly alerted when a customer falls behind or reaches a major milestone
- Build more dynamic customer health scores based on meaningful and weighted actions

Why ChurnZero Customers Love Journeys

"We have relied heavily on ChurnZero Journeys to help automate the onboarding process, guiding customers to a desired state right out of the gates."

Jeremy Jeffers, Untappd

UNTAPPD
DRINK SOCIALLY

Refract

"Journeys and Plays ensure I never miss anything now. I live in my daily task list, then as soon as they're ticked, I use the 'ChurnScore' changes section to be proactive, jumping on any change in client behavior. This has revolutionized my working day and the way I interact with my portfolio."

Jenni Byers, Refract

"Journeys deliver a consistent customer experience and will help onboard new CSMs faster."

Alex Henke, Speakap

speakap

binaryfountain

"The Journeys portion of the platform is what I enjoy best and helps us keep track of specific and important milestones and dates."

Jon Harrison, Binary Fountain