Use Case: Better Understand Customer Churn

Learn how Alchemer can help you better understand churn through the voice of the customer, and take targeted actions to retain at-risk accounts.

Think About It

1. When a customer churns, do you know why you lost their business?

2. As a sales leader, do you rely on account managers to provide loss reasons?

3. Do you have a process for closing the loop with at-risk customers?

Challenges

1. **Unable to understand churn through the voice of the customer:** Account managers provide valuable insights into why accounts are lost, however hearing directly from the voice of the customer is equally indispensable. Customers provide unfiltered, authentic insights that reflect their experiences, preferences, and pain points. This first-hand feedback is a goldmine, offering invaluable data on why customers are leaving and how current customers can be saved.

2. **Not enough customer feedback at critical touch points:** Without a way to connect customer records from your CRM to customer exit surveys, businesses may struggle to comprehensively understand customer experiences and concerns. This results in missed opportunities to salvage customer relationships before they churn.

Overview

Function: Account Management / Customer Success

Voice of the Customer teams use Alchemer to build feedback programs for different groups and departments across their organizations. These teams also use Alchemer Workflow to collect feedback from customers that are highly likely to churn. This feedback gives sales teams the information they need to identify savable customers and act on the feedback to prevent the loss of those customers' business.

Solution

When a customer gives notice of cancellation, they are asked to take a survey asking on how they are feeling and why they are feeling that way. New survey responses are automatically shared with the Sales Team. If, based on the survey, the Sales Team deems the customer can be saved, they will act on the feedback provided and attempt to salvage the customer relationship. In addition, the insights collected in the survey can be routed to the right department to make meaningful improvements

Integrations Supported

> To view all Alchemer Workflow integrations, click here.

1. Alchemer Workflow HubSpot Integration

2. Alchemer Workflow Oracle Integration

3. Alchemer Workflow Salesforce Integration

Outcomes

1. **Improved retention rate:** By acting quickly on feedback, the Sales Team can try and save renewal opportunities that are at risk.

   Business Impact: Retention rate improves.

2. **Better Customer Insights:** Exit surveys often gather more candid feedback from departing customers than direct questioning and rely less on the account managers.

   Business Impact: ARR increases.

3. **Higher customer satisfaction:** By including customer information in the exit survey and responding quickly to reasons customers give for cancellation, customers feel known and heard by the company. Customers who stay will have a better impression of the company, and customers who leave even after speaking to Sales may have a higher chance of returning at a later point.

   Business Impact: NPS score improvement.

How to Build This Use Case

Survey Components

1. In Alchemer Survey, create the following surveys.

- Exit Survey. Make sure to ask the following questions:
  - What was the reason for your cancellation?
  - Using survey logic, if price was the reason, ask "You mentioned price as a reason for your cancellation, which of the following best describes your concerns as it relates to the price of the product?".
  - Add any additional questions that will help you determine if the customer is savable or not!

- Customer Saved Survey. Make sure to ask the following questions:
  - What changed your mind?
  - How can we help you get the most out of our product going forward?
  - Which new feature(s) would you most like to see?
  - Add any additional questions that will help give you a better understanding of why the customer decided not to churn!

- Customer Lost Survey. Make sure to ask the following questions:
  - Would you consider [company name] in the future?
  - What can we improve on?
  - Add any additional questions that will help give you a better understanding of why the customer churned?

Workflow Components

1. In Alchemer Workflow, create a new Workflow.

2. Name the Workflow, then hit "Next".

3. Scroll down and select the Salesforce Workflow Initiator. In this use case, we want to initiate a workflow when a Salesforce record is updated to "At-Risk."

For additional guidance on configuring the Salesforce Initiator, refer to this documentation.
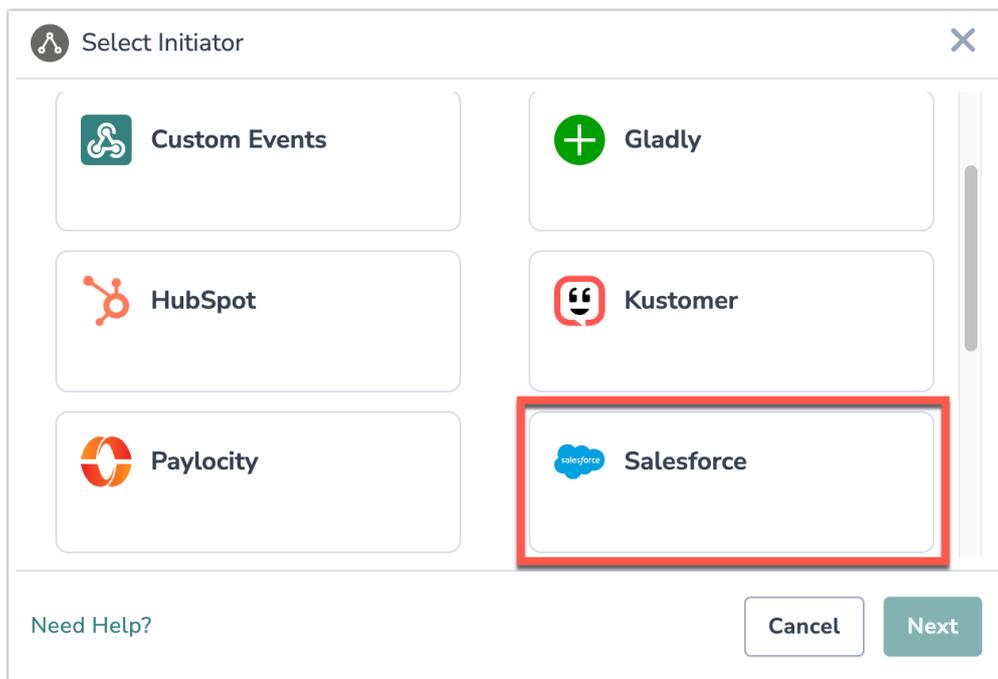
4. Select "Record Updated" as the Salesforce Event you want the Workflow to listen for.

Configure Initiator

Record updated
Starts the Alchemer Workflow when the selected Salesforce record type is updated.

Record created
Starts the Alchemer Workflow when a Salesforce record of the selected type is created.

Record created or updated
Starts the Alchemer Workflow when a Salesforce record of the selected record type is either created or updated.

Opportunity Closed Won
Starts the Alchemer Workflow when a Salesforce Opportunity is Closed-Won

Opportunity Closed Lost
Starts the Alchemer Workflow when a Salesforce Opportunity is Closed-Lost

Case Closed
Start a new workflow run every time a case is updated to "Closed". Automatically pull in case and contact fields to set up logic or merge codes.

‹ Previous: Select Initiator

Next

5. Select an already authenticated Salesforce account or authenticate a new Salesforce account.

For additional guidance on authenticating a Salesforce account with Alchemer, click here.

Configure Initiator ✕

Authentication

Select a Salesforce account to connect to.

Salesforce connected
Company ABC Salesforce Account

● ○

Previous   Next

6. Under the initiator, drag a Salesforce Pull action from the Steps Menu on the right side of the Workflow Builder. Select the pencil icon for the Salesforce Pull action.
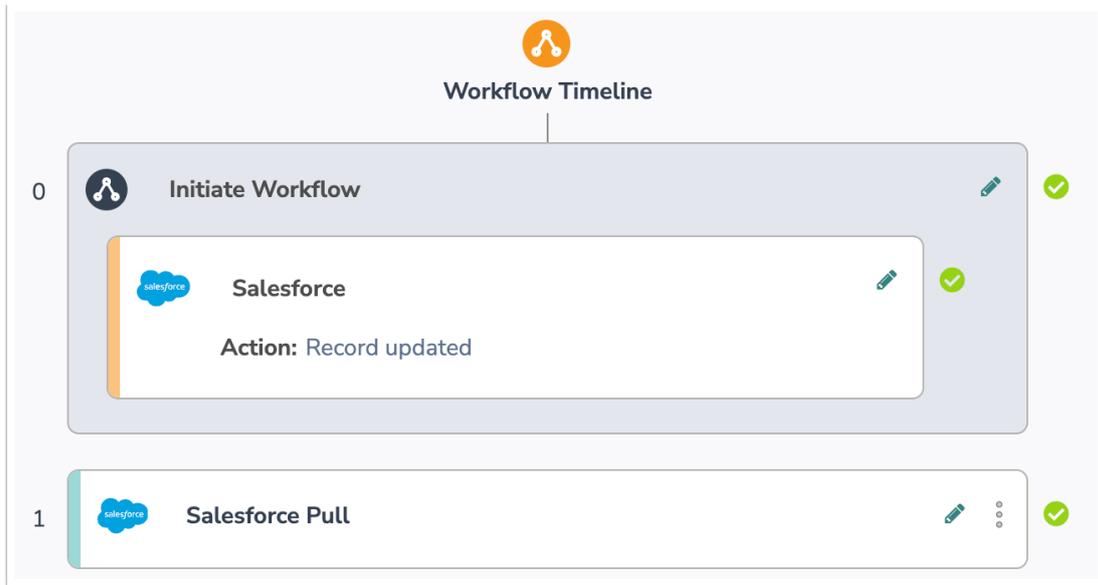
7. In the Salesforce Pull action that you added, match the following settings:

For more details on configuring Salesforce Push or Pull actions, refer to this documentation.

Field Mapping

Workflow Field		Salesforce	Default Value	
First Nam ⌄	←	First Name (string) ⌄		
Last Nam ⌄	←	Last Name (string) ⌄		✖
Email (Sa ⌄	←	Email (email) ⌄		✖
Phone (S ⌄	←	Business Phone (phone) ⌄		✖

+ Add another mapping

Cancel   Save Action

8. When the Workflow initiates we want to send the Exit Survey to the specific customer that is at-risk. So, add a Survey invite step to the Workflow.

9. After the Survey Invite, add a Survey Step and select the Exit Survey you already created.

✉	**Survey Invite: At Risk Customer**

☰	**Survey**
	Survey Name: [B2B Sales] Exit Survey

10. Next, add an If/else Logic block that:

- If, based on the Exit Survey, the customer is deemed savable, will send a Slack message to the Account Manager with the customer details.
- Else: If the customer is not deemed savable, Slack the Account Manager with the Loss Reason. Then add a Salesforce Push to mark the renewal opportunity as closed-lost. Complete the Workflow.

Logic - Able to Save

If: View Conditions ▲

#2 Survey: Question "What is the reason for your cancellation?" is one of the following answers ("Ease of use / Difficult to implement","Doesn't accomplish my use case")

5   Slack - Attempt to Save

Else

6   Slack - Loss Reason

7   Salesforce Push - Closed Lost

8   Complete
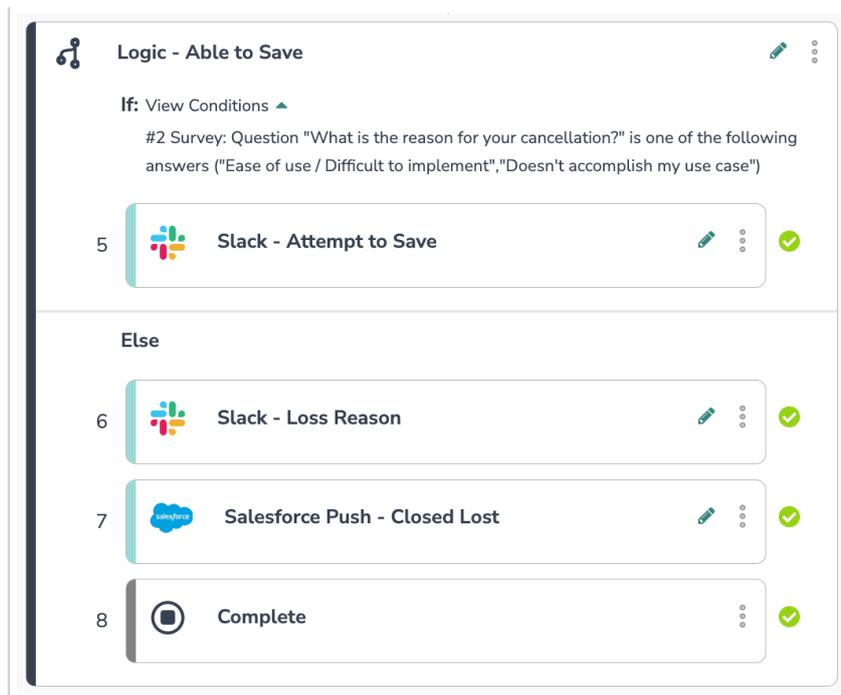
11. Add a Delay Step and set the delay to one week.

12. Add a Salesforce Pull step to pull the renewal opportunity status.

13. Add another If/Else Logic block that will send the Customer Lost survey to the departing customer if the Account Manager is not able to save the relationship. Push these survey responses to Salesforce.

14. Add another If/Else Logic block that will send the Customer Saved survey to the customer if the Account Manager is able to save the relationship. Push these survey responses to Salesforce.

Example Workflow

Workflow Timeline

Initiate Workflow

Salesforce

Action: Record updated

Salesforce Pull

Survey Invite: At Risk Customer
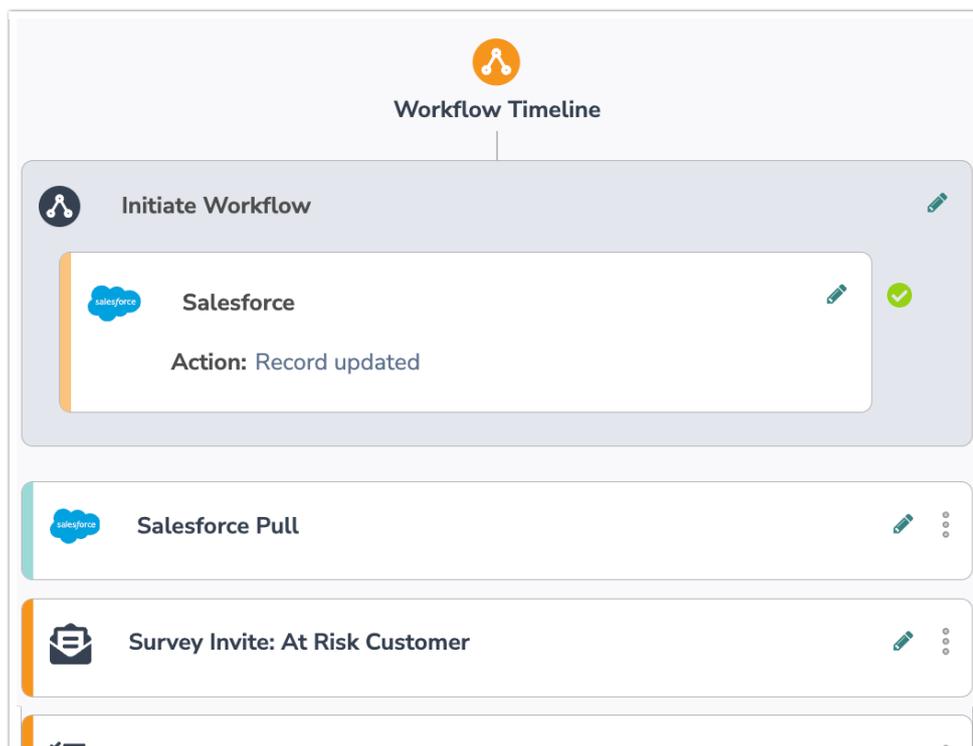
Survey

Survey Name: [B2B Sales] Exit Survey

Logic - Able to Save

If: View Conditions ▲

#2 Survey: Question "What is the reason for your cancellation?" is one of the following answers ("Ease of use / Difficult to implement","Doesn't accomplish my use case")

5 | **Slack - Attempt to Save** | ✏ ⋮ ✓

Else

6 | **Slack - Loss Reason** | ✏ ⋮ ✓

7 | **Salesforce Push - Closed Lost** | ✏ ⋮ ✓

8 | **Complete** | ⋮ ✓

Delay - Week 1

Salesforce Pull - Opp Status

If/Else Logic

If: View Conditions ▲

#2 Salesforce Pull - Opp Status: (Is Won (Salesforce Pull) is exactly equal to "False" AND Is Closed (Salesforce Pull) is exactly equal to "True")

12 | **Survey Invite** | ✏ ⋮ ✓

13 | **Survey - Closed Lost** | ✏ ⋮ ✓

Survey Name: [B2B Sales] Opp Change - Closed Lost

14 Salesforce Push

15 Complete

If/Else Logic

If: View Conditions ▲

#2 Salesforce Pull - Opp Status: (Is Won (Salesforce Pull) is exactly equal to "True" AND Is Closed (Salesforce Pull) is exactly equal to "True")

17 Survey Invite

18 Survey - Closed Won

Survey Name: [B2B Sales] Opp Change - Closed Won

19 Slack - Renewal

20 Complete

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