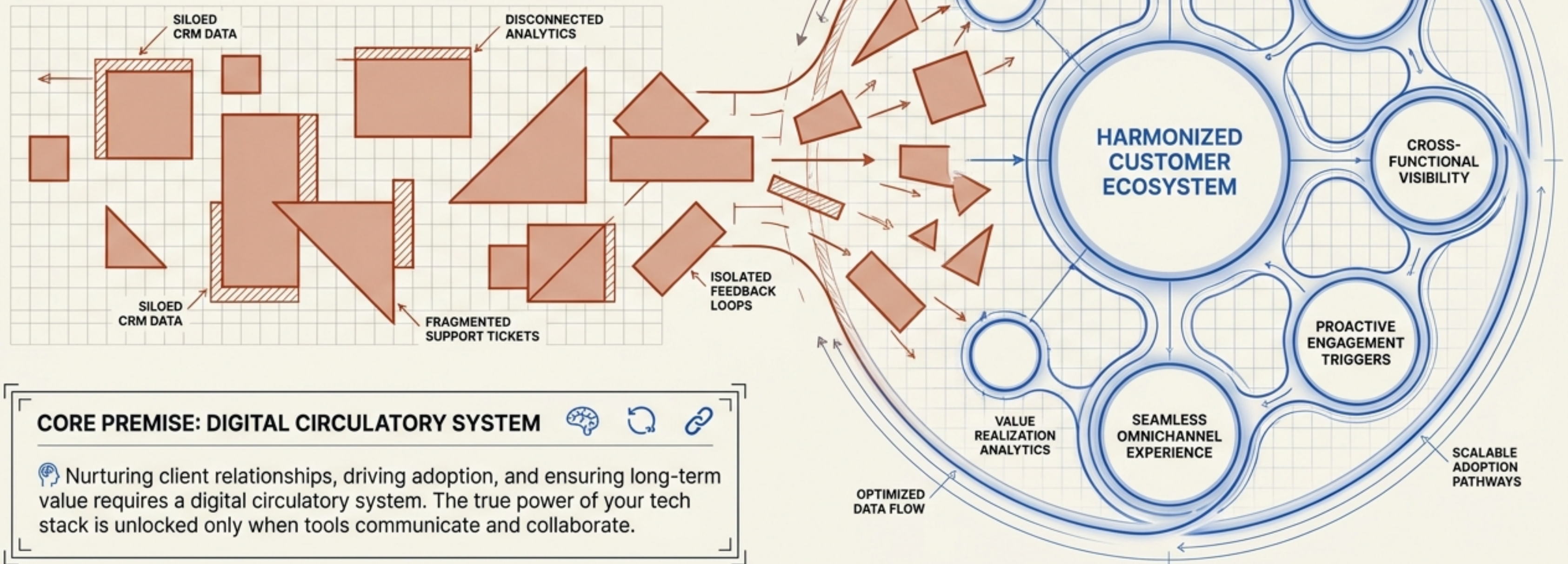
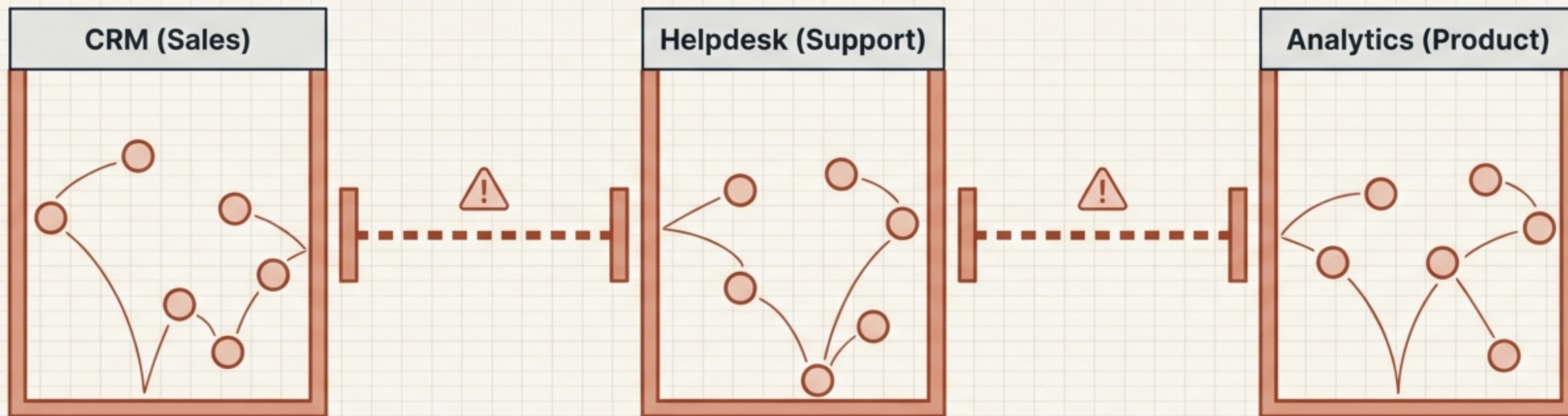


Moving From Data Silos to a Harmonized Customer Ecosystem

The strategic power of integrations in Customer Success tools.



Data Silos Keep Customer Success Teams Trapped in Reactive Firefighting



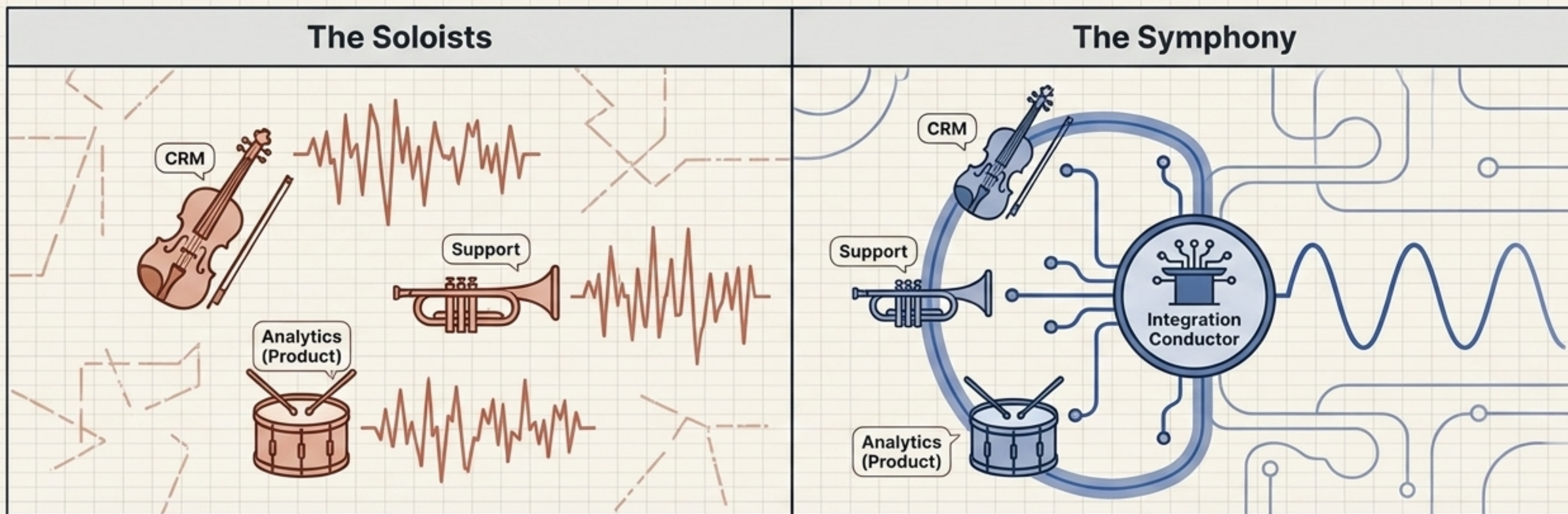
The Problem

When sales interactions reside solely in the CRM and tickets are sequestered in the helpdesk, a complete customer picture remains elusive.

The Impact

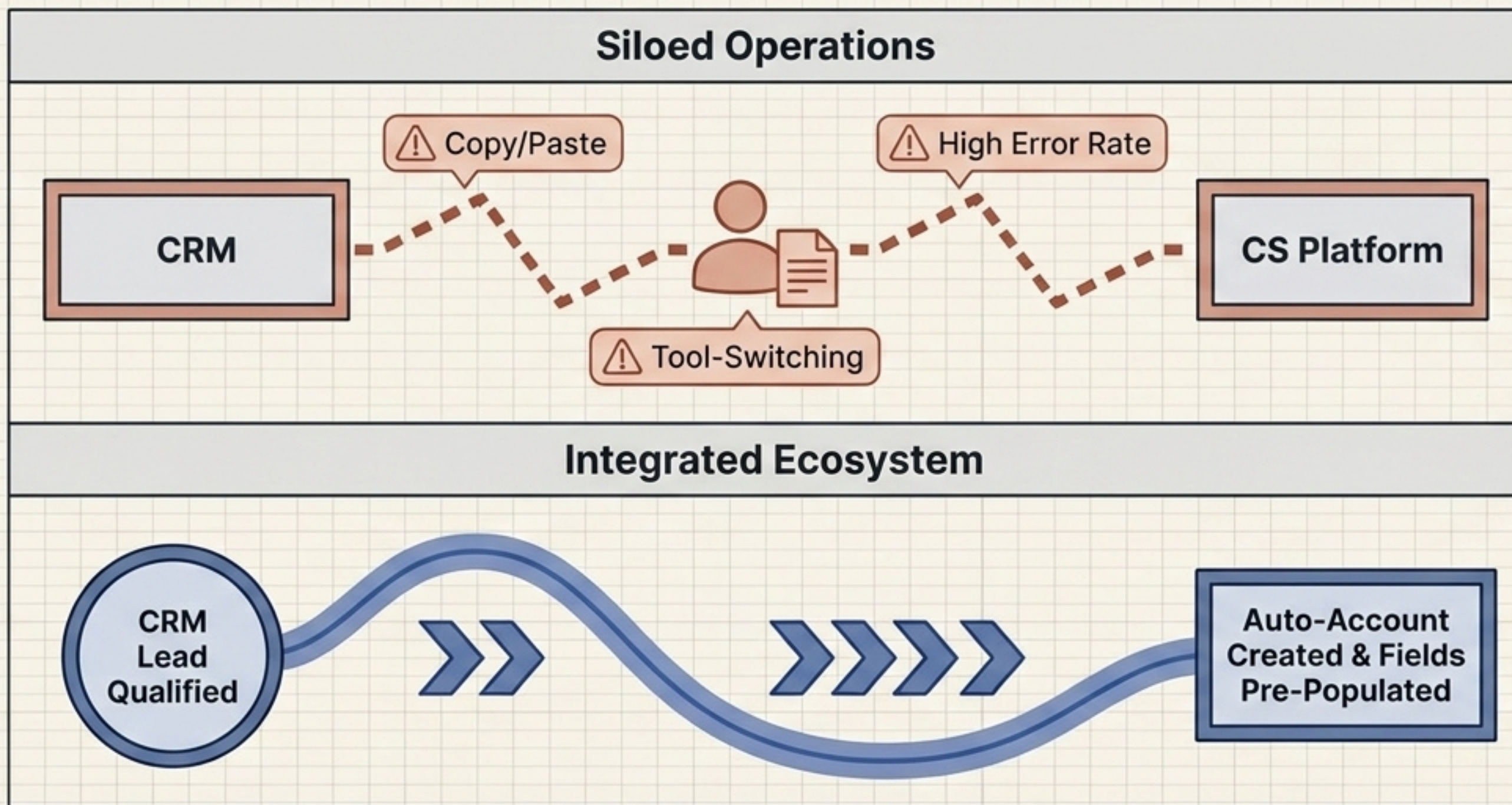
CSMs are forced to operate using disconnected snapshots rather than viewing the entire film of the customer journey.

Integrations Serve as the Conductor for a Fragmented Tech Stack



Without a shared score, individual tools produce disparate sounds—beautiful in isolation, but lacking cohesive power. Integrations act as the conductor, harmonizing data flow into a unified customer narrative.

Automated Workflows Dismantle the Administrative Burden



Mundane manual data entry drains productivity. By automating repetitive tasks, integrations free CSMs to focus entirely on high-value, strategic relationship building.

Connecting Disparate Touchpoints Unlocks a Panoramic 360-Degree View

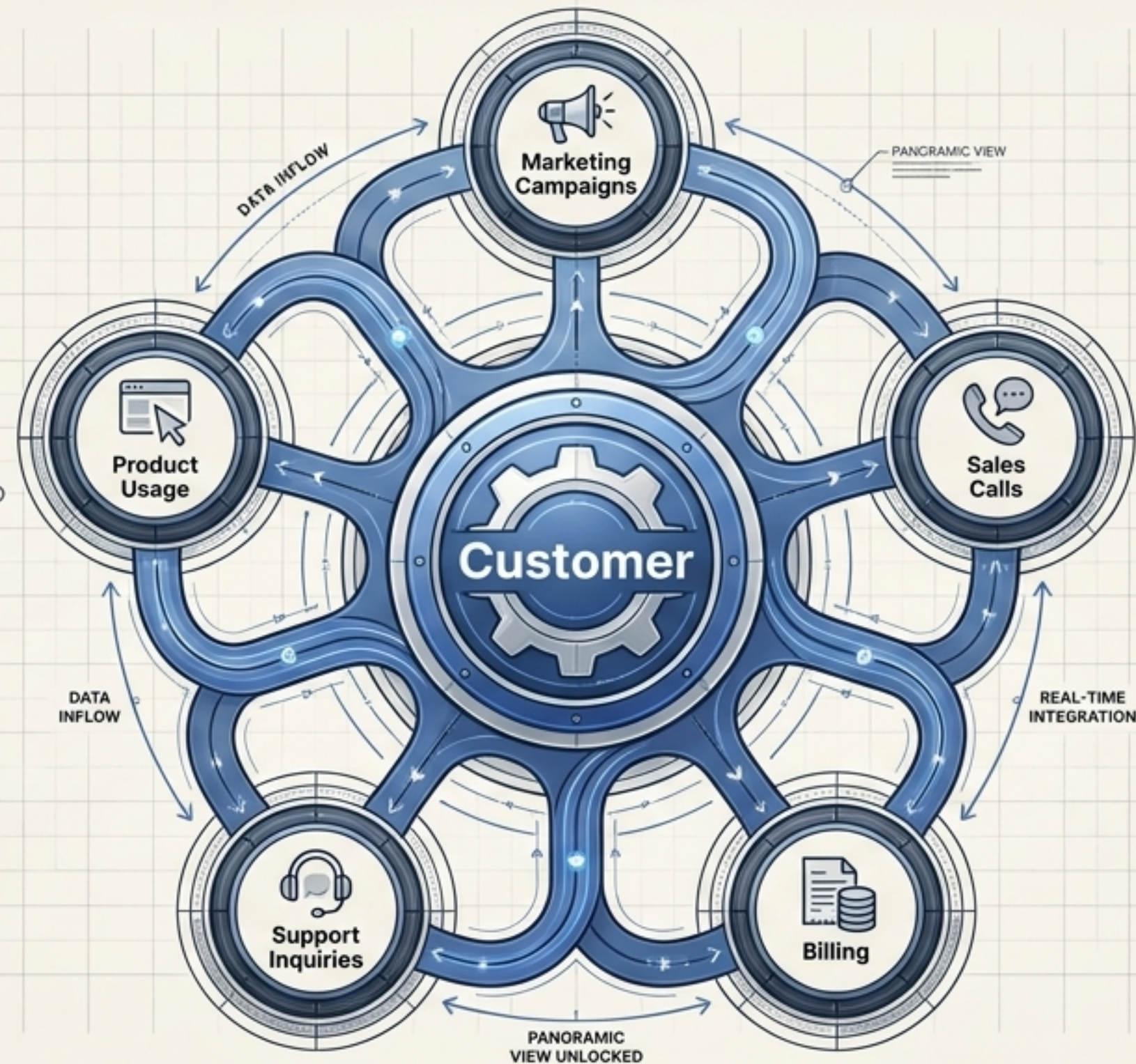
Key Insight

Customers interact across numerous channels, generating distinct data points.

When connected, these touchpoints unlock true personalization at scale.



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Outcome

Integrating marketing and CS platforms allows teams to segment users based on specific engagement levels, usage history, and goals to deliver highly relevant content and targeted webinars.



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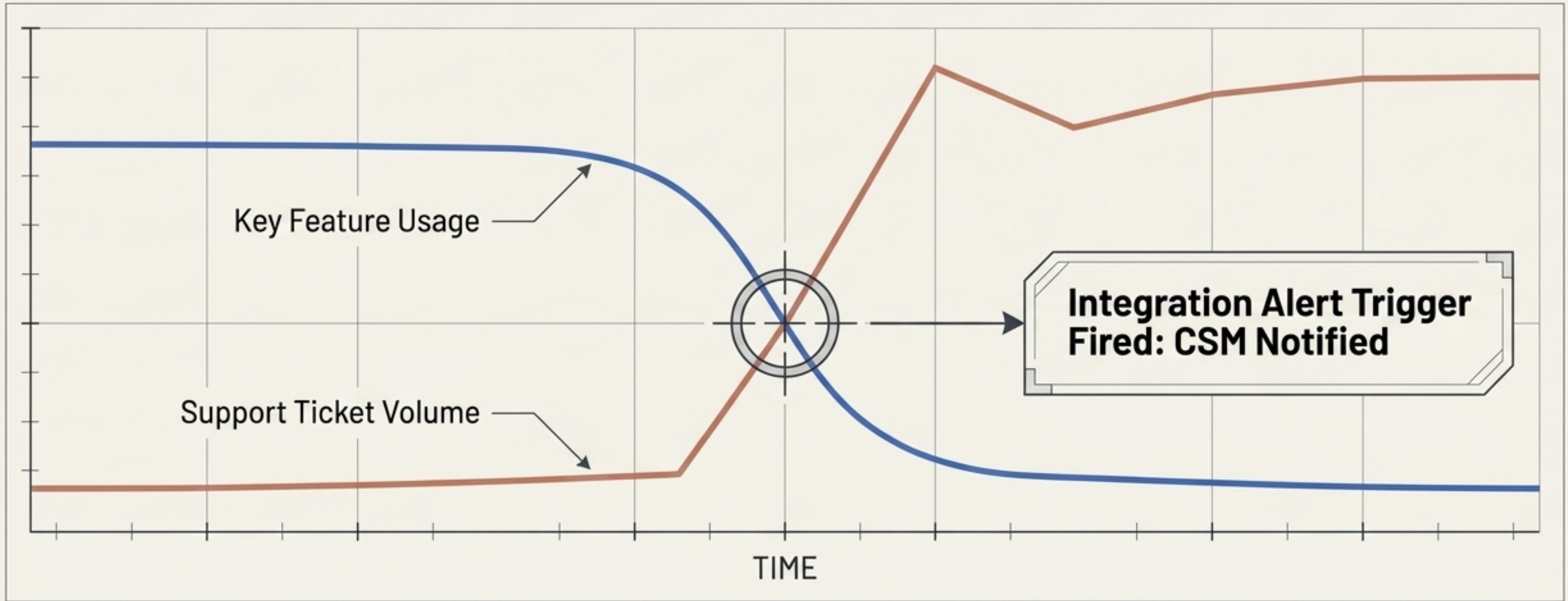


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Integrated Data Shifts Operations From Reactive to Proactive

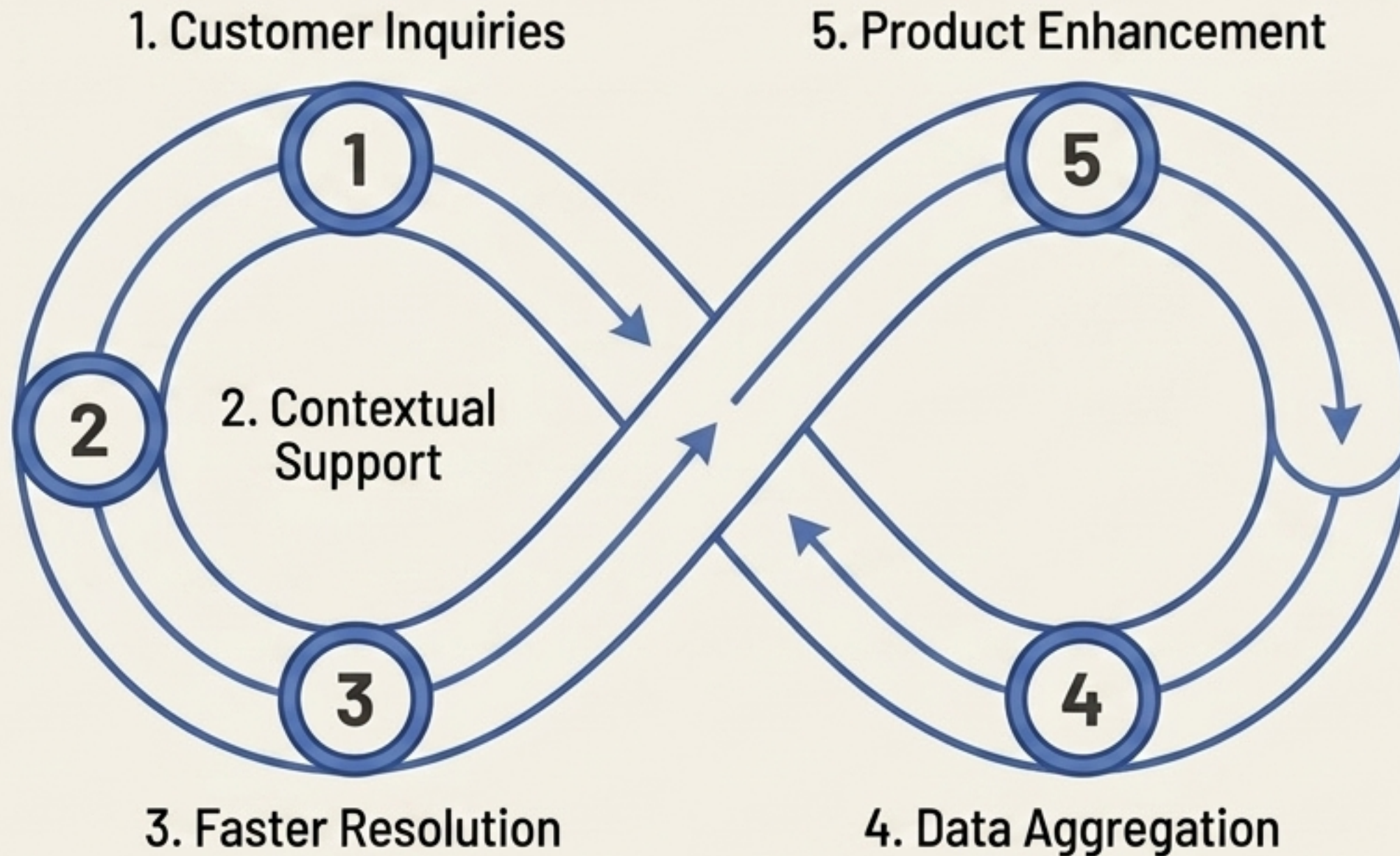
	Siloed Operations	Integrated Ecosystem
Churn Mitigation	Waiting for a customer to voice a complaint or submit a cancellation request.	Automated anomaly alerts trigger interventions before churn threats materialize.
Expansion	Blindly guessing when a customer might need an upgrade.	Billing and analytics data identify accounts consistently exceeding usage limits for perfectly timed cross-sell proposals.
Personalization	Addressing the customer by their first name in bulk emails.	Tailoring recommendations based on specific feature adoption and historical support context.

Combining Usage and Support Data Creates an Early Warning System



When siloed, a drop in feature usage or a spike in tickets offers only isolated clues. When integrated, these intersecting data points instantly flag a potential churn event, allowing for rapid, targeted intervention before the customer is lost.

Seamless Handoffs Drive a Continuous Loop of Product Improvement



The Handoff

Integrations eliminate the clunky baton pass. Support agents instantly see the client's background, usage, and CSM interactions, eliminating redundant questions.

The Feedback Loop

Connecting survey tools with CS dashboards systematically turns buried complaints into irrefutable evidence for necessary product upgrades.

Harmonized Ecosystems Drive Measurable Improvements Across Key KPIs

Customer Retention Rate

Impact: Seamless data flow powers proactive support.



Example Tools: Salesforce, Zendesk, HubSpot

Time to Resolution

Impact: Reduced manual data entry speeds up issue resolution.



Example Tools: Jira, Freshdesk, Intercom

Customer Health Score



Impact: Aggregates multi-source data for accurate composite scoring.

Example Tools: Gainsight, Totango, ChurnZero

Upsell/Cross-sell Rate



Impact: Integrated insights identify targeted offer opportunities.

Example Tools: HubSpot, Salesforce, Marketo

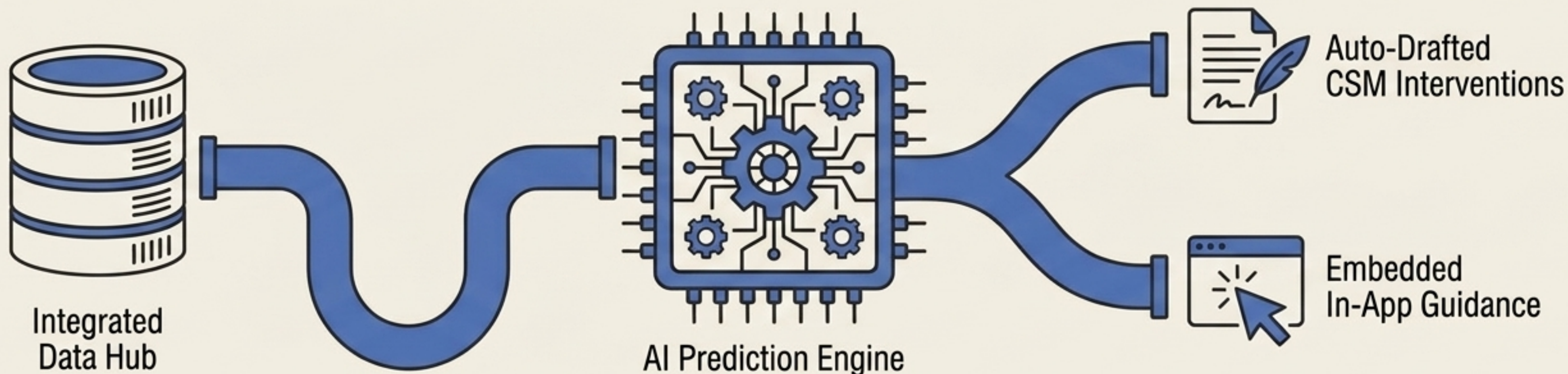
Customer Engagement



Impact: Enables personalized, omnichannel communication.

Example Tools: Slack, Mailchimp, Drift

The Future of Customer Success Relies on AI-Driven, Embedded Ecosystems



AI-Driven Insights

Integrated data will power machine learning to identify churn risks before humans notice, automatically suggesting tailored interventions and drafting personalized outreach.

Embedded Customer Success

Connecting CS platforms directly into the product allows for dynamic user-segment product tours, contextual help, and in-app messaging precisely when needed.

The Bottom Line

The future strength of a company's Customer Success will be directly proportional to the sophistication of its integrated ecosystem.