

CASE STUDY

POST-PURCHASE CUSTOMER JOURNEY: ARR GROWTH DRIVERS

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MARKETING AUTOMATION: ARR GROWTH & RETENTION

What?

Marketing automation simply enables marketing to send automated emails or notifications to new and existing customers,

in a timely manner that can be fully tracked for behaviours and ROI

Most common tools are Salesforce Pardot or Hubspot

How?

- 1. Prospect Nurture: Marketing campaign and SDR Outbound Comms**
 - a) Automated SDR prospecting comms
 - b) Automated email workflows triggered by prospect behaviour. E.g. website submissions
- 2. Post-purchase: Supporting Account Management and Customer Success to maximise RPU and counter churn**
 - a) **Onboarding cycles by customer type**
 - b) **Customer Nurture**
 - i. Up and X-sell in both managed & unmanaged customer base
 - ii. Tail Accounts: automated brand & MSP comms to drive CSAT and RPU
 - iii. Timely customer service comms
 - iv. Newsletters
 - c) **Renewals Optimisation: Automated comms simplifying process, driving up/x-sell & reducing churn**

Why?

- **Successfully nurture prospects** to the correct stage for sales to handle
- **Keep in touch with our customers** with thought leadership and value propositions
- **Improve the churn rate of our customers** – increase retention / extend footprint within customer
- **Increase RPU from customer base**
- **360 view of our prospects and customers behaviours** to enable data-driven decisions
- **Ability to fully track the leads & calculate marketing ROI**

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GOALS

- To increase cross-selling / upselling via increasing awareness of evolving MSP portfolio & ARR cyber/cloud solutions
- To develop an engaging customer experience program “post purchase”
- To reduce customer churn, increase customer lifetime value (LTV) and contract tenure across entire portfolio



Launch Activities

Onboarding

Welcome cycle:
Tailored emails &
customer landing
pages

ARR / MSP Services:
Demo's & Service-
overlay engagement

Portal registration

Expert Guidance:
Customer Success
Support

MSP / Cyber ARR
cross-sell

Nurture

Customer segment
development

MSP / Cyber ARR
cross-sell / up-sell
matrix

Chase Repeat
revenues that are
Non-ARR

Launch Newsletter

- New brand
- Case Studies
- New Services

Renewals

<120/90/60/30day
workflow outlined

Build “countering
termination”
playbook

Launch weekly
comms: Pre/post
payment

Review future
automation options for

- self-service renewal
- recommended packages

Win-back

Re-engagement
comms with
offers for

- Terminated customers
- Terminated agreements
- Lost bids



STRATEGY

- Launch targeted & automated onboarding, nurture & renewal customer communication workflows
- Maximize RPU with predicted “next best action” campaign activity at each journey stage, leveraging
 - Enhanced brand, new MSP Launch, new Tech partnerships
 - Up/cross-sell of ARR/MSP Portfolio – mapped to vertical



Initial Steps....

Segmentation

- Data analysis to inform customer segments within CRM
- Customers onboarded into segments – guiding messaging & level of automation versus in-person engagement value
- Nurture: Automated up or x-sell Cyber / MSP ARR campaigns

Win-back

- Tactical re-engagement campaigns targeting
 - Fully terminated customers
 - Lost agreements
 - Lost bids

Renewals

- Existing ARR Renewals / up/cross sell <120 days
- Identification of customer churn type patterns. Launch counter termination tactical campaigns
- Review existing customer portal – scope for further PP Automation