

Improving Customer Adoption and Retention Through Proactive Customer Success

DigitalWinch SaaS & Technology | Role: Customer Success Manager

Business Challenge

DigitalWinch SaaS & Technology noticed that several customers were cancelling their subscriptions shortly after onboarding. While customer acquisition remained healthy, early churn was reducing recurring revenue and limiting opportunities for account expansion.

A review of customer interactions revealed several underlying issues:

- Customers were not achieving their desired outcomes quickly enough.
- Product onboarding was inconsistent across accounts.
- Customer goals were not documented or tracked.
- Check-ins only occurred when customers raised issues.
- Expansion opportunities were being missed because customer business objectives were not regularly reviewed.

The company needed a structured Customer Success approach focused on helping customers realize value throughout their lifecycle rather than only providing reactive support.

Solution: A Five-Part Framework

I designed a proactive Customer Success framework that guided customers from onboarding through ongoing adoption and growth.

1. Goal-Based Customer Onboarding

Rather than simply demonstrating product features, every onboarding session began by understanding the customer's business objectives. These goals became the benchmark for measuring customer success.

- Reducing manual work
- Improving operational efficiency
- Increasing team productivity
- Tracking business performance

2. Guided Product Adoption

Created a structured onboarding journey so customers knew exactly how to use the platform to achieve their objectives.

- Welcome meeting
- Product configuration
- User training sessions
- Feature adoption milestones
- Success checklist
- 30-, 60- and 90-day progress reviews

3. Proactive Customer Health Monitoring

Implemented recurring customer check-ins instead of waiting for support tickets, allowing risks to be identified early before they resulted in churn.

- Progress toward customer goals
- Feature usage
- Adoption challenges
- Customer satisfaction
- Upcoming business priorities

4. Churn Prevention Strategy

When customers indicated they were considering cancelling, a structured retention process shifted conversations from cancellation requests to problem-solving discussions.

- Understanding the root cause of dissatisfaction
- Reviewing product usage data
- Recommending underutilized features
- Providing additional training where needed
- Offering solutions tailored to their business challenges
- Agreeing on a follow-up success plan

5. Expansion Opportunity Reviews

During Quarterly Business Reviews, I evaluated customers' evolving business goals and identified opportunities for growth, enabling Customer Success to contribute directly to revenue.

- Increased product usage
- Additional departments requiring access
- New business locations
- Requests for advanced functionality
- Increased user adoption

Business Impact

- Improved onboarding consistency across new customers.
- Earlier identification of churn risks through recurring health checks.
- Better customer engagement through personalized success planning.
- Stronger customer relationships built on continuous value delivery.
- Increased opportunities for upselling and account expansion.
- Greater visibility into customer health, adoption and satisfaction.

Deliverable 1 — Customer Success Plan

Customer Goal	Success Metric	Timeline	Owner	Status
Reduce manual reporting	60% reduction	90 Days	Operations Manager	In Progress
Increase user adoption	90% active users	60 Days	HR Manager	On Track
Faster approvals	30% faster workflows	90 Days	Finance Team	Planned

Deliverable 2 — Customer Onboarding Checklist

Week 1

- Kickoff meeting
- Business goals captured
- Success metrics defined
- Key stakeholders introduced
- Product configuration

Week 2

- Administrator training
- User training
- Knowledge base shared
- FAQs delivered

Week 3

- First adoption review
- User feedback session
- Product usage assessment

Week 4

- Customer health review
- Adoption score updated
- Success plan reviewed

Deliverable 3 — 30-60-90 Day Adoption Plan

Phase	Objectives	Success Metrics
First 30 Days	Complete onboarding; train all users; activate core features	80% login rate; admin training completed; first workflow created
Days 31–60	Increase feature adoption; improve engagement	Weekly active users; feature usage growth; reduced support tickets
Days 61–90	Achieve measurable outcomes; prepare for QBR	Goal completion; CSAT; product utilization

Deliverable 4 — Customer Health Score Dashboard

Metric	Weight	Current Score
Product Usage	30%	27
Feature Adoption	25%	22
Support Tickets	15%	12
Meeting Attendance	10%	10
Executive Engagement	10%	9
NPS / CSAT	10%	8
Total	100%	88

Health categories: Healthy (80–100) · Needs Attention (60–79) · At Risk (below 60)

Deliverable 5 — Customer Check-in Agenda

- Business updates

- Product usage review
- Progress against goals
- Challenges
- Feature recommendations
- Upcoming priorities
- Training requirements
- Next action items, owners and due dates

Deliverable 6 — Churn Risk Assessment

Risk Indicator	Status
Declining logins	Yes
Reduced feature usage	Yes
Low executive engagement	No
Multiple unresolved tickets	Yes
Missed meetings	No

Root cause: customer team had not completed user training.

- Additional training
- Executive alignment meeting
- Weekly check-ins
- Product optimization session

Deliverable 7 — Customer Feedback Tracker

Date	Feedback	Category	Priority	Status
Jan 12	Dashboard slow	Product	High	Escalated
Jan 19	Need export feature	Feature Request	Medium	Planned
Jan 28	Excellent onboarding	Positive Feedback	Low	Closed

Deliverable 8 — QBR Template

- Executive summary
- Business objectives
- Achievements
- Product adoption
- ROI delivered
- Health score
- Open risks
- Recommendations
- Expansion opportunities
- Next quarter goals
- Action plan

Deliverable 9 — Expansion Pipeline

Opportunity	Value	Probability	Next Step
Additional Users	High	90%	Proposal
Premium Analytics	Medium	70%	Demo
Additional Business Unit	High	80%	Executive Meeting

Deliverable 10 — Customer Journey Map

Stage	Key Activities	Success Measure
Onboarding	Kickoff, configuration, training	Time to first value
Adoption	Feature milestones, usage reviews	Weekly active users
Value Realization	Goal progress against success plan	Goal completion
Quarterly Business Review	Business outcomes and ROI	Health score
Renewal	Renewal readiness assessment	Renewal rate
Expansion	New users, units, advanced features	Expansion revenue
Customer Advocacy	References, case studies, reviews	NPS

Tools Used

Category	Tools
CRM	Salesforce
Customer Success	Gainsight
Communication	Intercom, Slack, Zoom
Product Analytics	Mixpanel
Knowledge Management	Notion
Productivity	Google Workspace, Microsoft Excel