

Future of Success: Innovation Sneak Peak

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The journey is the product

We continue to innovate and bring the tools to bring your success faster and get you more powerful

- **Streamline experience**
- **Open platform**
- **High value communications**

Streamline experience

Totango Search for accounts, users, and more... Exec Team

Manage Onboarding Projects Onboarding INVITE

Scorecard Canvas Segments Reports Assets SuccessPlays Campaigns Setup

All Types + All Statuses + All Owners By Label + Saved FEEDBACK SHARE A LINK Search

Unmapped Cards

High CSAT Score
Accounts 2

Task
Request Reference

Task
Upsell Opportunities?

Inactive

+ Add 1 Card

Kick Off

Welcome Email
Users 1

Welcome [Name] Hello

This email is sent to new users after they log in for the first time

Ongoing
Start Date: May 18 2021

Draft

Internal Hand Over and Preparation
Accounts 2

+ Add 2 Cards

Discovery

Business Discovery
Accounts 2

Task
Send Business Discovery Meeting Summary

Task
Send Welcome Email and Conduct Business Discovery...

Inactive

+ Add 1 Card

Implementation

Implementation
Accounts 3

Task
Step 2: Data Integration

Task
Step 4: UAT

See 3 more

Inactive

Weekly Value Report
Accounts 1 Users 1

+ Add 2 Cards

Live

Post-Onboarding Satisfaction Survey
Accounts 1 Users 1

We value your feedback.

Email prompting users to provide feedback about their onboarding experience

Ongoing
Start Now

Draft

Low CSAT Score
Accounts 2

+ Add 2 Cards

<https://app.totango.com/t01/demo-service-5/#/successbloc/158406/canvas>

CX Journey Canvas

Bringing together teams to plan, **build, design, and run** more inspiring customer journeys

User Experience & Reliability

10.3 bn

Data Entries

280 m

Daily Updates

-28%

Response Time

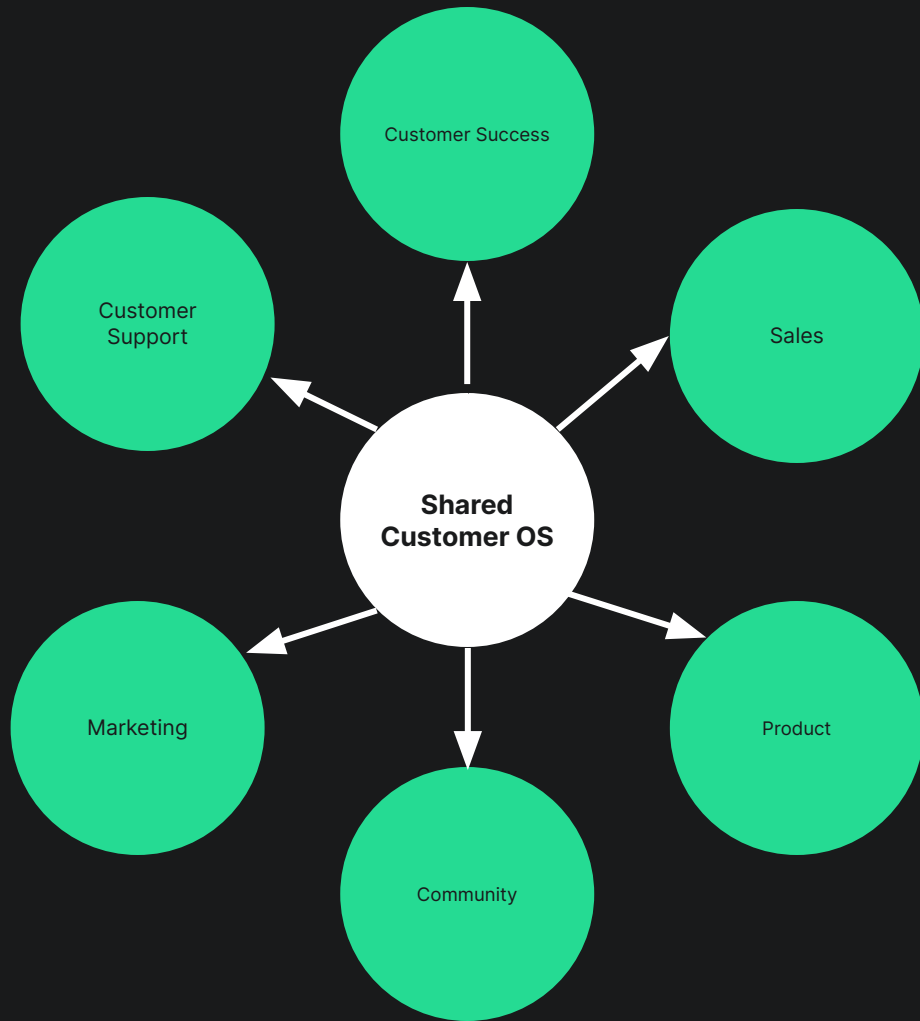
+46%

Fast Queries
Volume

**Open the platform to the
company**

Open the platform to the company

Zoe enables you to share across the company



Open the platform to the company

Now all flows integrated into the CS days to day



Opportunity lifecycle management

- Enable CS identify opportunities based on data
- Ongoing alignment between teams
- Easy recognition for CS attribution

The screenshot shows the Totango 'Opportunities' dashboard for the company 'Goodsilron'. The dashboard includes a search bar at the top, a navigation menu with tabs for OVERVIEW, TIMELINE, PLAN, USAGE, and ASSETS, and a '+ NEW OPPORTUNITY' button. A filter bar indicates 'Opportunity Stage is not Closed Won or Closed Lost' with '+ More Filters'. Three summary cards are displayed: a circular progress indicator showing 75% with a breakdown of \$450.00K (1), \$0.00 (0), and \$0.00 (0); a card for 'NUMBER OF OPPORTUNITIES' showing 2; and a card for 'OPPORTUNITY VALUE' showing \$600.00K. Below these is a table of opportunities with columns for Name, Opportunity Cl..., Opportunity ..., Opportunity ..., and Opportun. The table lists two opportunities: 'Goodsilron - Renewal' (Dec 31st, 2023, NR Nate Richarc, New) and 'Goodsilron - Increase D...' (Nov 30th, 2022, NR Nate Richarc, Qualifying). A 'SEE FULL SCREEN' link and pagination '1-2 of 2' are at the bottom.

Totango

Search for accounts, users, and more...

< Goodsilron COMPANY

Goodsilron Opportunities 2

OVERVIEW TIMELINE PLAN USAGE ASSETS

Opportunities + NEW OPPORTUNITY

Opportunity Stage is not Closed Won or Closed Lost x + More Filters

75 \$450.00K | 1
\$0.00 | 0
\$0.00 | 0

NUMBER OF OPPORTUNITIES
2

OPPORTUNITY VALUE
\$600.00K

Search opportunity

Name	Opportunity Cl...	Opportunity ...	Opportunity ...	Opportun
Goodsilron - Renewal	Dec 31st, 2023	NR Nate Richarc	New	Renewal
Goodsilron - Increase D...	Nov 30th, 2022	NR Nate Richarc	Qualifying	Upsell

SEE FULL SCREEN 1-2 of 2

Demo





Customer
Success
Summit:
Teams

Download Totango Apps

**Best Customer
Success**



**Customer
Journey Analyzer**



High value communication

High value communication

Asynchronous Communication

- Metrics Video - [VideoBEATS](#)
- Email flows

Synchronous Communication

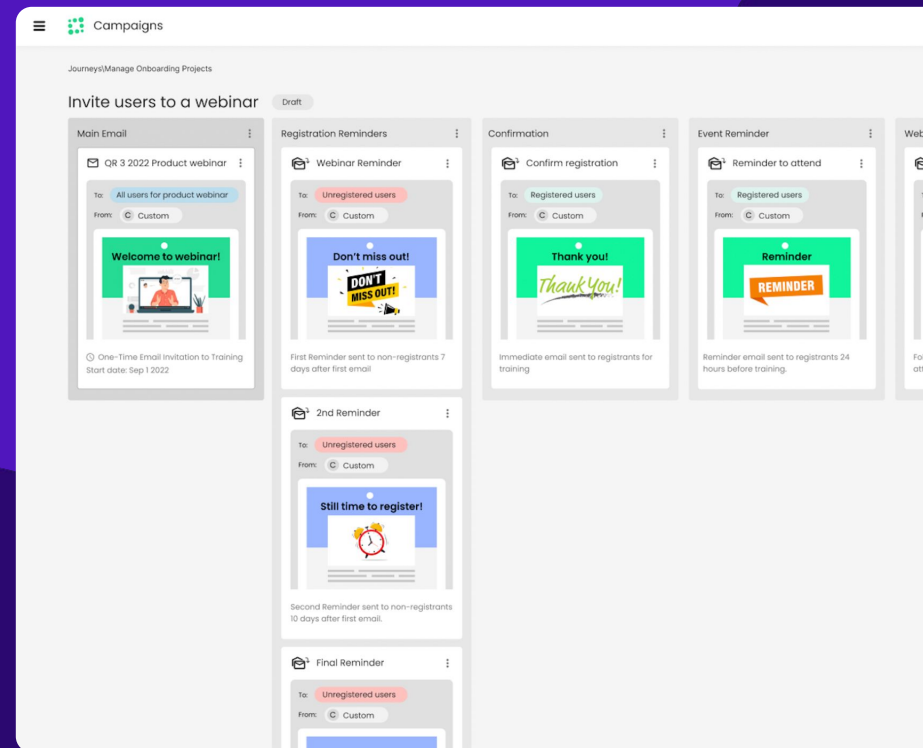
- Presentation Builder

Asynchronous Communication

Email Flow

- Combine separate email campaigns into a single journey
- Carry over settings from one email to the next
- View data for multiple emails in one place

Email Flow:



High value communication

Asynchronous Communication

- Metrics Video - [VideoBEATS](#)
- Email flows

Synchronous Communication

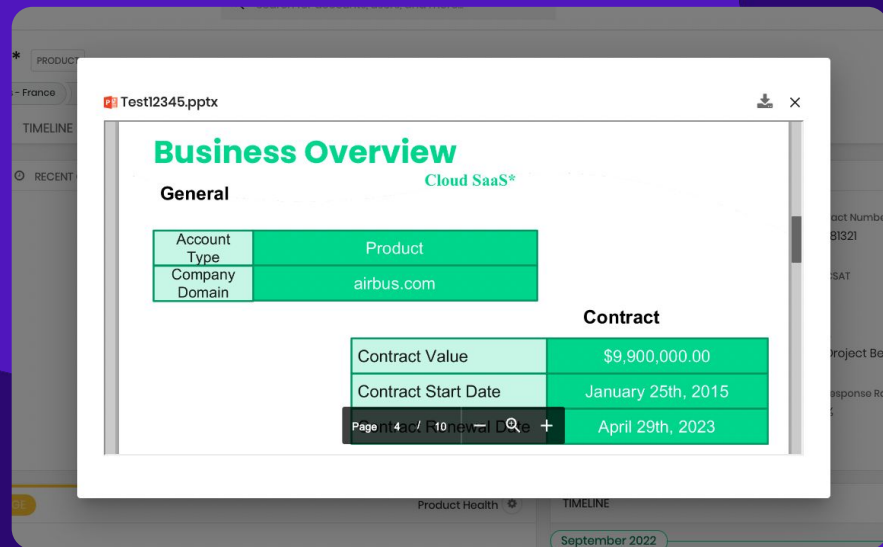
- Presentation Builder

Synchronous Communication

More efficient communication with your customers

- Saves you time
- Provides flexible content
- Coordinates delivery & follow-up

Presentation Builder:



Demo



- **Streamline experience**
- **Open platform**
- **High value communications**



Thank You



Customer
Success
Summit:
Teams

Download Totango Apps

**Best Customer
Success**



**Customer
Journey Analyzer**

