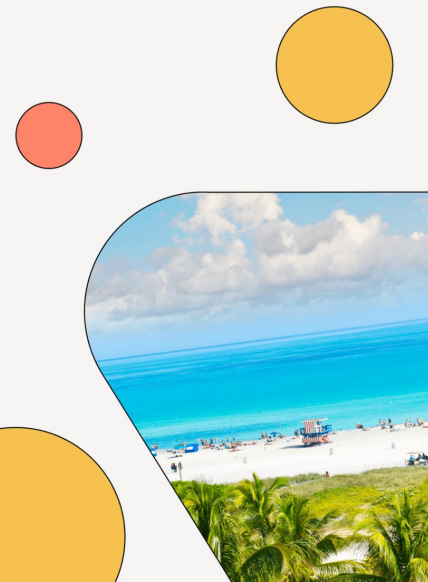


How Egnyte Used Automation to Refresh Processes and Reach New Heights

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What is Egnyte?

Egnyte provides the only unified cloud content governance solution for collaboration, data security, compliance, and threat management, for multi-cloud businesses.



About Us



6 Customer Success Operations Team Members

33 Total Customer Success Team Size

21% Customers Assigned to a CSM*

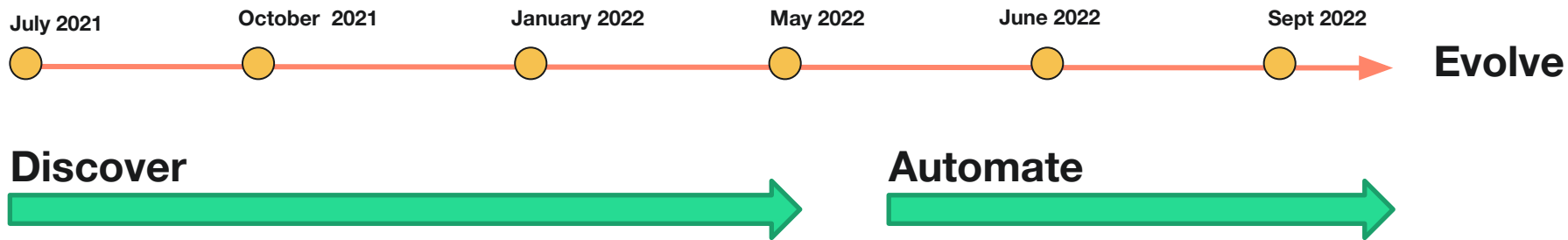
79% Customers Assigned to tech touch*

**ARR determines assignments*

What we'll cover

1. **Discover**
2. **Automate**
3. **Evolve**

Our Story



Discover

Before Automation...

- **Invest in a Customer Success Operations Team.** Investing in operations will catalyze your entire customer success team by making them more efficient and effective.
- **Understand Totango's design.** This is where you will identify opportunities and how you can map out automation.
- **Establish a single source of truth for all Customer Success.** Partner with leadership team to establish a definitive single source of truth for customer data. We chose Totango.

**“Automation applied to an
inefficient operation will magnify
the inefficiency.”**

- Bill Gates

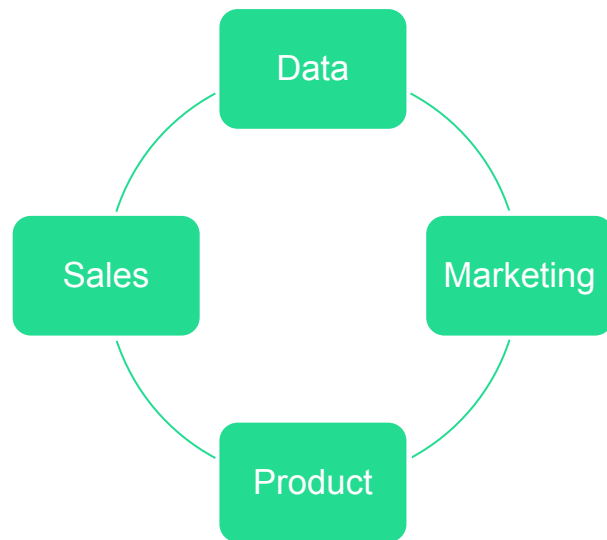
Alliances at Egnyte

Data team partnered with Customer Success (CS) to identify duplicate, irrelevant or legacy data sources.

Marketing and Customer Success to work as one on look and feel and all content.

Product team and CS work as one team to address customer feedback and suggestions.

Sales team and CS partner to identify data points that identify advocacy potential or expansion opportunities.



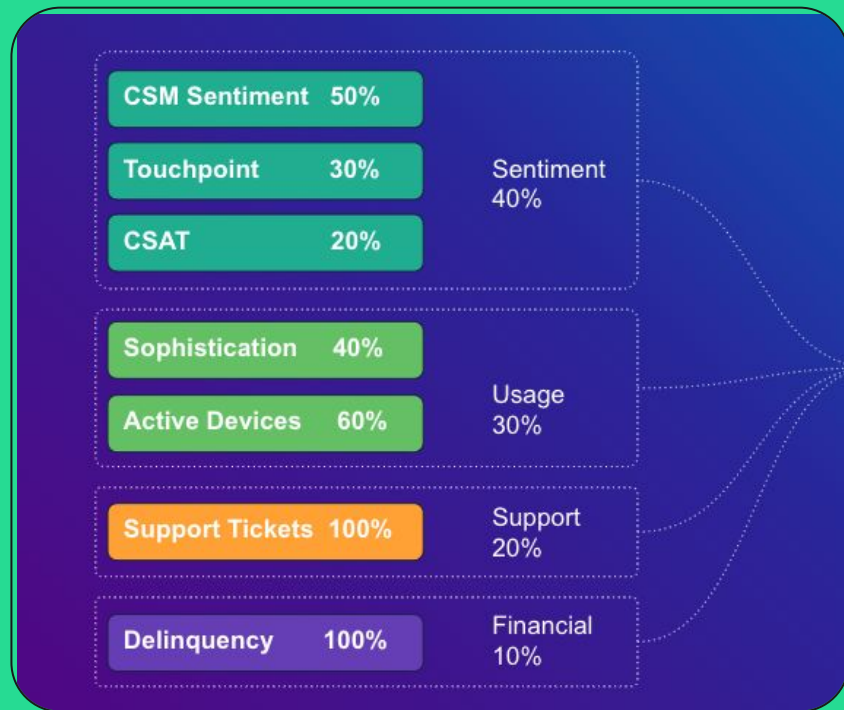
How we aligned at Egnyte

- A single voice of customer communications protocol established. All customer-facing communications are tracked on a calendar available to all and reviewed during a monthly meeting.
- Automated the workflow for all NPS feedback.
- Established Customer Success representation on the product team, marketing team, and sales team.
- Defined Totango as the single source of truth for all Customer Success.

Automate

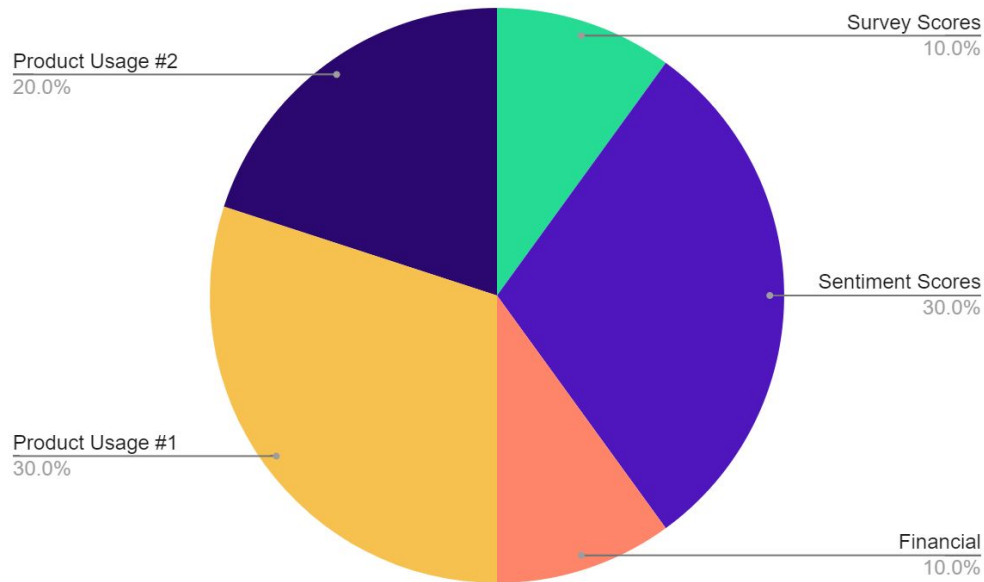
Multidimensional Health

Created and implemented a health score that drives all actions and engagements



Moving to Multi-Dimensional Health

The implementation of a Multi-Dimensional Health model generated systemic changes at all levels of the organization.



Onboarding the Customer

Expanding the Lifecycle Journey from High-Touch to Tech-Touch Customers

- **The Customer Lifecycle.** What is it and how can we use it for our TechTouch customers?
- **Define key touchpoints.** When should a customer receive information along the journey?
- **Define the actions that drive the message.** What resources does this customer need to be successful?
- **Define the journeys to avoid.** Communicating too frequently with little benefit does more harm than good.

Onboarding the Customer

A Campaign Refresh

- **Retired our Avatar.** A real person was behind every signature of our email. This adds credibility to automated messaging.
- **Messages were trimmed and edited.** Campaigns were written from the perspective of a success manager. Despite being automated, it added a level of customization.
- **Strong calls to action.** Onboarding success was ensured by writing campaigns with detailed self-service instructions and resources.
- **Include the ability to get direct assistance.** Each message includes an option to respond and get help. Tech Touch does not mean no human touch.

Automated, but not impersonal

Customer response examples from automated campaigns:

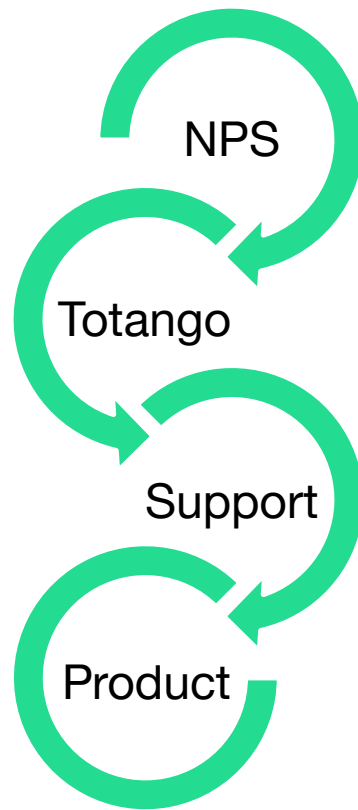
"I'm doing wonderfully Brian! Thanks for checking in. We completed setup the weekend after I purchased the service and have full-scale adoption at this point with no issues. I'll reach out to you if I need anything further. I appreciate your support and hope you are doing well!"

*"Dear Brian,
I would love to talk to you. Since I know more colleagues are having issues, I've asked them to respond. Let me get back to you if I have the results."*

"Hello Brian, I have not dipped into Egnyte yet."

Voice of the Customer Program

We used the power of our campaigns **and** integrations to scale up our Voice of the Customer Program, track progress, and reduce manual workload.



Partnerships & Automation Produce Results

50%

Workload reduction
when managing
Voice of the
Customer Program.

60%

Of our data was purged
due to deprecation or
duplication.

30%

Response rate from
automated
Advocacy Ask and
75% enrollment.

75%

Reduction in Customer
campaign messages.

Evolve

Evolution Requires Constant Evaluation

- **Review:** Establish a periodic review process. Adjust what's working and what's not.
- **Listen:** Listen to your internal partners and let their feedback drive innovation.
- **Pivot:** Pivot as business needs evolve. Change is inevitable!
- **Experiment:** Don't be afraid to be innovative. Don't be limited by predefined concepts.

Thank You

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