Power your winning customer retention strategy

With Slack, Tableau, Service Cloud and Atrium

Table of contents

The call for subscription-based services in a changing market

A subscription contradiction

How we work has changed, and as we settle into a combination of on-site, remote and hybrid work, we need to enable an always-on, user-centric digital environment that drives business execution. We've seen this play out with increased cloud adoption and the spike in subscription-based services.

Yet we're running in place. Customer interactions are now harder, with less face time and more online sales. At the same time, customer expectations have increased, narrowing the margin for seller error. This means that despite the overall rise in subscription-based services, customers are shifting loyalties within the segment more easily, depending on their changing needs and macroeconomic headwinds.

Buyers today want the most cost-effective options and are focused on utilization. The result is an increase in churn, with customers now willing to buy from new entrants.

To combat these challenges, the first step in beating the market is predicting churn. But this is difficult to achieve without full visibility into customer behavior and attrition.

70%-80% **of B2B decision makers prefer remote human interactions or digital self-service.[1]**

1 "How Much Time and Energy Do We Waste Toggling Between Applications?" *Harvard Business Review,* 2022

The challenge of predicting attrition in time for action

Predicting churn before the burn

Predicting customer churn in annual recurring revenue (ARR) for cloud services can be challenging due to a range of factors, such as poor quality or missing data; variation in customer behavior patterns; multichannel interactions; and data privacy and security.

Assuming you can procure the right data, you still need to collate and transform it into timely and actionable insights that will enable you to predict churn. You need a single, unified dashboard for real-time insight and intelligence-based actionable items in the flow of everyday work. Further, these recommended actions then need to be funneled to the right stakeholder in time for remedial or preventive action to be taken. All data and potential insights are wasted if they don't reach the right person in the right format at the right time.

That's why predicting customer churn in ARR for cloud services requires a comprehensive and multidisciplinary approach, combining data science, business understanding and domain expertise.

In this e-book, we explore how Slack, Tableau, Salesforce Service Cloud and Atrium are transforming the tech industry's customer retention strategy. With solutions from Atrium, a Slack-certified consulting partner, you can bring your customer data from Salesforce into innovative Tableau dashboards—allowing teams responsible for revenue operations to see the most important churn data right from Slack.

Act fast to minimize churn with Slack-powered insights

Earn, don't churn—with insights in the flow of work

Slack is the productivity platform where your RevOps team works every day to collaborate with stakeholders. This is also where they work with marketing, sales and customer service leaders, ensuring customers are satisfied and subscriptions are profitable. The next logical step is to bring crucial insights into where they work, eliminating redundancies and cobbling together data insights from disparate sources.

Atrium integrates Salesforce offerings like Sales Cloud, Service Cloud and Tableau into Slack in a unified and comprehensive solution. It pulls crucial customer acquisition and usage data into Tableau, which is then delivered back to Slack where teams can easily analyze and visualize the data in the productivity platform they use every day. After review, Tableau-generated insights and recommended actions from Tableau are pushed to Service Cloud, a critical customer retention and satisfaction system. And all this happens within Slack. The beauty of the solution is the elimination of toggling between different apps, saving hundreds of working hours in a year.

Atrium brings Service Cloud data and Tableau visualizations into Slack to help your team:

- Provide accurate forecasting and immediate action
- Understand issues driving customer defection
- Identify new services and offerings to ward off attrition events
- Kick off successful account-based marketing programs

- The average worker spends a little over **two seconds** toggling between apps.

- Workers toggle as many as **1,200 times** each day.

- This amounts to **four hours** of time spent per week or **9%** of their annual time at work.[1]

Your prepackaged data science team

A dedicated data science team is a resource-intensive proposition to maintain but brings immense value. Atrium, by going beyond connecting the dots between software and a cohesive experience, offers the power of a fully formed data science team with technical expertise specific to your industry and use cases. So how does Atrium's solution serve your unique needs?

Within Slack, the solution connects with customer intelligence in Tableau, offers actionable insights, pushes recommended actions to Service Cloud, monitors developments in Tableau, and closes the data loop for your RevOps stakeholders.

Long-term benefits of Atrium's solution:

By breaking down silos and building analytics within workflows, customers democratize their data with Slack.

This evangelizes data-driven decisions throughout the organization.

The solution enables customer-centric, cross-functional collaboration across different departments around the RevOps process.

The automation of routine, repetitive tasks and workflows is simple, thanks to Slack's no-code builds. This frees up time for value-added work, with the additional benefit of being custom-built to your needs.

Making the most of your data with AI

You might have the data that points you points you to the cause of possible customer attrition. But it can be challenging to decode. Even if you were to wade through your masses of data, you can confuse causation and correlation or miss out on the nuances of utilization data—like which components of your offering are being utilized, and to what degree. These are all critical aspects to flag and address potential customer attrition. This is where Atrium's solution leverages artificial intelligence (AI) to help.

Let's unpack how this works through a hypothetical use case: A customer's use of your product has dropped drastically. You're unaware of this behavior change because you haven't received direct customer communication about it. How can you address this?

Feeding your customer data into Tableau will allow you to track important customer metrics and set alerts against certain data thresholds like consumption by measuring compute power. This tells you how the customer is using your product, which parts, and to what degree. A drop-off in the compute consumption is flagged as a drop in utilization.

This intelligence is then pushed to Slack, with a prompt for corrective action that loops back into Service Cloud. Assuming downtime has been detected in Tableau, this could be a potential engineering ticket. Underutilization could also trigger a customer success motion that then goes to sales for a different, cost-effective offer to the customer. It might also mean that a solution specialist reaches out to the customer and sets up a training session demonstrating the value of underutilized parts of the product.

All these actions tracked in Service Cloud—and orchestrated in Slack—reduce the likelihood of churn. This reduction in potential attrition then resets the scores in Tableau and builds a fresh loop improving on the previous one.

The best part? You're not toggling between a suite of different applications to get this done. It's all happening in Slack, where you and your team work.

Integrated solutions in action

The revenue is real

At this point, you might be thinking, "That's great, but what does it mean for my bottom line?"

With Slack alone, customers report that their service teams are seeing:

28% faster resolution time[2]	**15% reduction in cost per ticket[3]**	**17% reduction in escalations[3]**

When you use <u>Service Cloud with Slack</u>, there is a massive **26% decrease** in case resolution time,[4] and the benefits only rise when Atrium processes customer acquisition and usage data through Tableau.
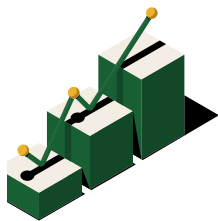
Atrium's implementations have shown the ROI of connected revenue systems:[5]

47% increase in close rates	**$50M** in additional revenue by increasing conversion rates	**$250K** in additional pipeline discovered within 2 hours of going live	**43%** decrease in revenue at risk	**20%** increase in staff retention due to seamless and integrated sales and service experience

Let's look at how it played out for an organization that was struggling to empower its teams with the right insights at the right time.

2 Customer Success Metrics, Slack, FY23, July 2022
3 *The Total Economic Impact™ of Slack for Service Teams*, a commissioned study conducted by Forrester Consulting on behalf of Slack, 2021
4 How Our Support Agents Use Case Swarming With Slack To Solve Cases Fast
5 Figures based on several projects, 2023

Solution in action

Challenge

A large technology organization with over 2,000 employees was struggling with siloed data. Disjointed data stored manually in spreadsheets was minimizing the sales team's access to key metrics and actionable customer insights.

Objective

The sales team wanted their metrics in one place to reduce manual work and redundancies while also improving accessibility. Moreover, the data had to be in a format that was intuitive, easy to read and quick to put together. A clean, simplified dashboard with real-time data would help them increase forecast accuracy and reduce customer attrition.

The Atrium-Slack solution

Unified data
Atrium combined data from three different systems into one and improved existing implementations. It also helped the company optimize its usage of Salesforce, SQL and Tableau and shortened the time to create reports.

Visibility into team performance
Custom-built dashboards display key sales metrics, including actual vs. target, average sales price, quota attainment, funnel analysis, quarter-to-quarter comparison, and sales trends and forecasts.

Insights into at-risk customers
Atrium created dashboards to display accurate account performance forecasting. This allowed the sales team to identify at-risk customers and take immediate action.

slack from Salesforce | ▲ atrium

🙌 7   ⭐ 5

📣 9

Retrain your data to retain your customers

You've experienced firsthand the challenges of retaining customers in the shifting sands of changing technology markets. We're ready to partner with you to make the process smoother, faster, and more insightful and collaborative.

Reach out to start the conversation

Learn more:

→ **Slack for tech companies**

→ **Extend the power of Service Cloud to Slack**

→ **Tableau + Slack: put data at the center of every conversation**

→ **Slack consulting services from Atrium**

→ **Salesforce consulting services from Atrium**

→ **Tableau consulting services from Atrium**