

Top Customer Success **Alerts** & Notifications to be **Automated**






Health Score

Sample Account Intelligence:

If for account = **All Accounts** Account Health score moves **Down** for **3 weeks** in a row then notify **Customer Success Leader & Customer Success Manager** of Accounts via **Email**.

 Created By **Elizabeth D. Nestor** Creation Date **12 OCT 20** ×

For Account(s) **All Accounts** × ▼

Type of Alert **Health Score Change Alert** ▼

Alert Name **HEALTH_SCORE_CHANGE_ALERT_09**

Trigger the alert when:

Health score moves **Down** ▼

For **3** weeks in a row

Notify **CSM of Account** × **CSM Leader** × ▼

Via **Email** × ▼

Frequency **Weekly** ▼ **Monday** ▼

Notify **11** ▼ **00** ▼ **(GMT-05:00) Americ...** ▼

Cancel **Add Alert**




Renewal

Sample Account Intelligence:

For the account {{African Sands}} if renewal is coming up in the next

2 Months then notify

Customer Success Leader & Customer Success Manager of Account via **Email**.

 Created By Elizabeth D. Nestor Creation Date 11 SEP 20 ×

For Account(s) African Sands × ▼

Type of Alert Upcoming Renewals ▼

Alert Name UPCOMING_RENEWALS_ALERT_05

Trigger the alert when:

Renewal is coming up in the next 2 Months ▼

Notify CSM Leader × CSM of Account × ▼

Via Email × ▼

Frequency Daily ▼

Notify 08 ▼ 00 ▼ (GMT-05:00) Americ... ▼

Cancel Update Alert




Touchpoints

Sample Account Intelligence:

For account = **All Accounts**,
if number of Touchpoints of Type ALL
move **Down** for **3 Months** in a row,
then notify **Customer Success Manager**
about each Account via **Email & SMS**.

Add Alert ✕

 Created By Barry Fuller Creation Date 01 FEB 20

For Account(s) All Accounts ✕

Type of Alert TouchPoints Trend

Alert Name TouchPoints_Trend_01

Trigger the alert when :

Touchpoints Trend ALL

Move Down

For 3 months in a row

Notify CSM of Account

Via Email ✕ SMS ✕

Frequency Monthly 3

Time 11 00 (GMT+01:00)


Cancel Add Alert



Champion

Sample Account Intelligence:

For account {{Access Cloud}} if your Champion **Cheryl Elliott** becomes inactive then notify **Cindy Roberts, Andrew Thomson & Customer Success Leader** via **Email And SMS**.

 Created By **Elizabeth D. Nestor** Creation Date **12 OCT 20** ×

For Account(s) **Access Cloud** × ▼

Type of Alert **Champion** ▼

Alert Name **CHAMPION_ALERT_07**

Trigger the alert when:

Champion **Cheryl Elliott** × ▼
become(s) inactive

Notify **Cindy Roberts** × **Andrew Thomson** × ▼
CSM Leader ×

Via **Email** × **SMS** × ▼

Frequency **Daily** ▼

Notify **10** ▼ **00** ▼ **(GMT-05:00) Americ...** ▼

Cancel **Add Alert**


Automated Customer Success Alert



MRR

Sample Account Intelligence:

For account = **All Accounts**
if last Month's MRR goes
Down by more than **0.3%**
(compared to month before)
then notify **Amrutha, Akshata**
via **Email**.

 Created By
Elizabeth D. Nestor

Creation Date
12 OCT 20 ×

For Account(s) **All Accounts** ×

Type of Alert **MRR Trend Alert**

Alert Name **MRR_TREND_ALERT_06**

Trigger the alert when:

If Last Month's MRR goes **Down**

By more than **0.3** %

Notify **Akshata** × **Amrutha** ×

Via **Email** ×

Frequency **Monthly** **5**

Notify **07** **00** **(GMT-05:00) Americ...**

Cancel **Add Alert**



Churn

Sample Account Intelligence:

For account = **All Accounts**,
if CHURN for **last 3 Months**,
exceeds more than **80%** of set
Churn Tolerance, then notify
Customer Success Manager
of Accounts via **Email**.

Add Alert



Created By
Barry Fuller

Creation Date
01 FEB 20

For Account(s)

All Accounts x

Type of Alert

Churn

Alert Name

Churn_01

Trigger the alert when :

Churn for duration

Last 3 months

Exceeds

80

% of Churn Tolerance

Notify

CSM of Account

Via

Email x SMS x

Frequency

Monthly

7

Time

11

MM

(GMT+01:00)

Cancel


Add Alert



Feature Usage

Sample Account Intelligence:

For account **Boxing Lab** if usage of feature **Patient Appointments** moves **Down** by **More than 5%** in the last **1 Month** then notify **Customer Success Manager** of Account via **Email**.

 Created By **Elizabeth D. Nestor** Creation Date **14 OCT 20** ×

For Account(s) **Boxing Lab** ×

Type of Alert **Feature Usage Trend Alert**

Alert Name **FEATURE_USAGE_TREND_ALERT_05**

Trigger the alert when:

Usage of Feature **Patient Appointments**

Moves **Down**

By more than **5** %

In the Last **1** **Month(s)**

Notify **CSM of Account** ×

Via **Email** ×

Frequency **Monthly** **1**

Notify **06** **00** **(GMT-05:00) Americ...**


Cancel Add Alert



Tasks

Sample Account Intelligence:

For account = **All Accounts**
when Due Date of any task is
Today then notify **Creator of
Task & Assignee of Task** via **Email**.

 Created By
Elizabeth D. Nestor

Creation Date
14 OCT 20 ×

For Account(s) **All Accounts** × ▾

Type of Alert **Tasks Due Alert** ▾

Alert Name **TASKS_DUE_TODAY**

Trigger the alert when:

When Due Date of Task **Is Today** ▾

Notify **Assignee** × **Creator** × ▾

Via **Email** × ▾

Frequency **Daily** ▾

Notify **08** ▾ **00** ▾ **(GMT-05:00) Americ...** ▾

Cancel **Add Alert**