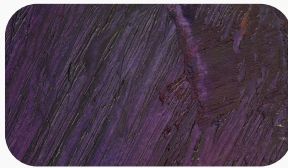


SCALING CLIENT EXPERIENCE

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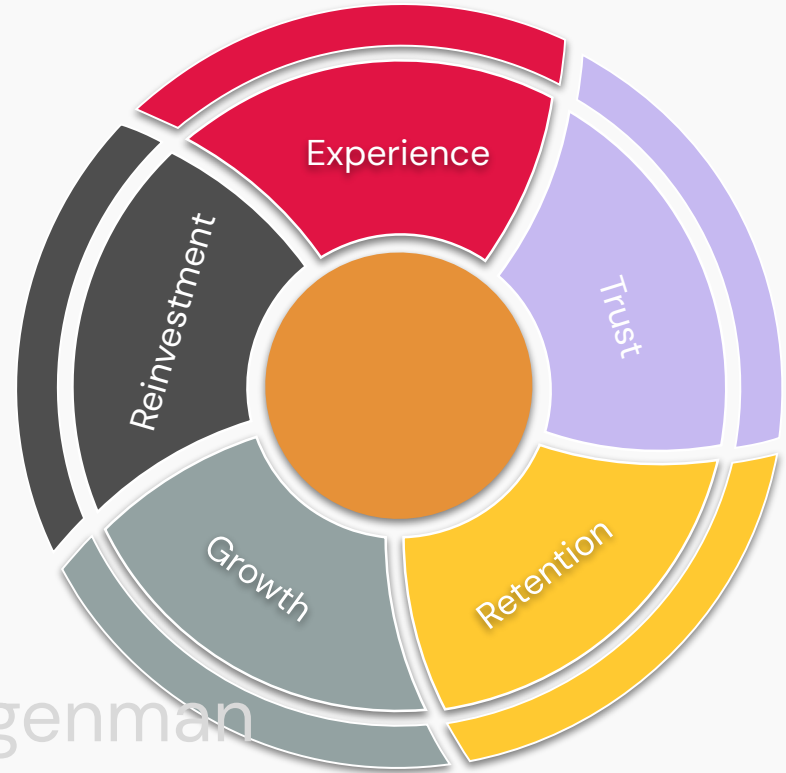
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THE SUCCESS FLYWHEEL

Over the past year, our CS model supported growth, but not without growing pains.

We learned to balance scale, satisfaction, and team health to turn CS into a growth driver.



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What's Working (and What's Working Too Hard)

Our CS team delivered results, but the way we got there was not sustainable.

What's working

- Clients love our hands-on approach
- Clear ownership of client relationships
- Strong collaboration across teams

What's working too hard

- Heavy reliance on individual heroics
- Role overlap causing inefficiency
- Constant context-switching drains time and focus

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When everyone is doing a bit of everything, consistency and creativity suffer.



A Model for Scale

When headcount can't scale linearly, leverage has to.

THE INFLECTION POINT

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GROWTH

MODEL

EVOLUTION

Growth introduced new complexity: more clients, more data, more to coordinate.

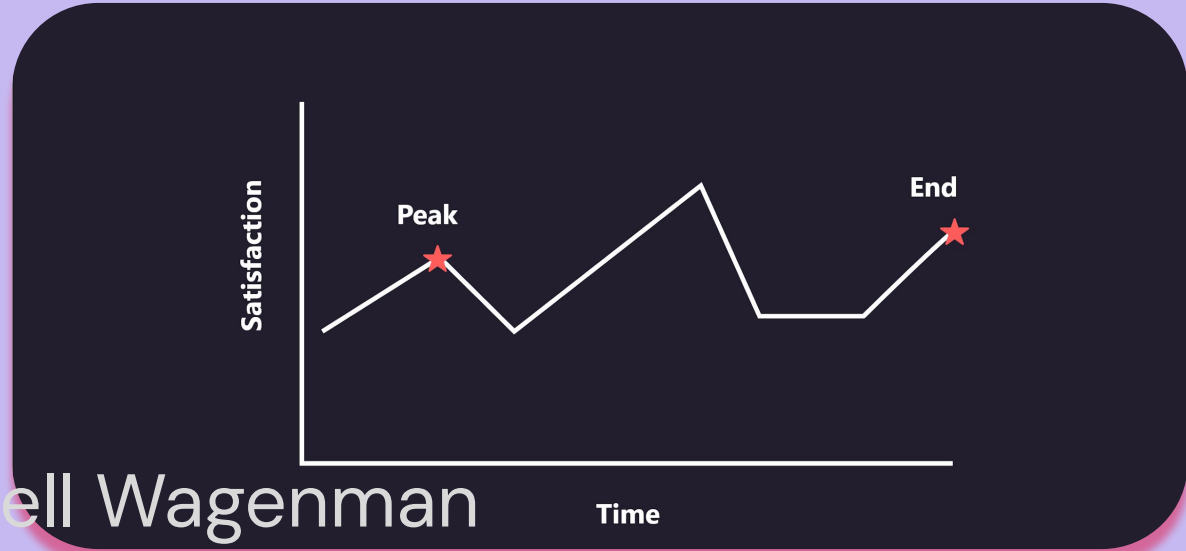
The old model depended on manual processes and personal bandwidth – great for relationships, hard for scale.

We had to evolve from a *team of experts* to an *engine of expertise*.

DESIGNING THE MOMENTS THAT MATTER

How we applied behavioral science to client experience design.

People do not remember every step of a journey – they remember the peak and the ending



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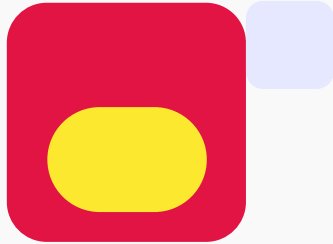
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This principle guided our onboarding redesign and engagement flow

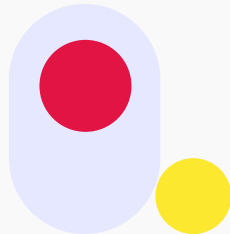
It created emotional peaks – “wow” moments early, and a sense of partnership at renewal

MAKING THE GREAT REPEATABLE

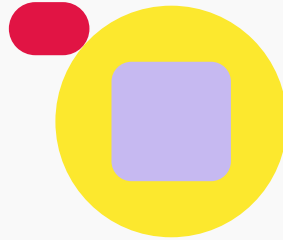
Redefining onboarding to be structured, measurable, and emotionally memorable.



Automated progress tracking and client communications.



Defined 3 “moments that matter”: welcome, first milestone, and first success



Created a playbook handoff process — CSMs received a full client profile and readiness score.

RESULTS

25% Shortened time to value

12 Points of increased CSAT post-onboarding

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SCALING WITHOUT BURNOUT

Our biggest constraint wasn't growth — it was *capacity*.

Key principle: A calm, predictable rhythm is the foundation of scalable excellence.

CHALLENGES

- Reactive firefighting limited time for proactive work.
- Repetitive tasks consumed high-skill time.
- Morale dipped as load increased.



What Worked

- Introduced shared support pods.
- Automated 30% of recurring tasks (status updates, renewal reminders).
- Established “no heroics” guidelines — prioritize scalable impact over immediate fixes.

TURNING GAPS INTO LEVERAGE

Every pain point became a design opportunity and growth lever.

1

DATA VISIBILITY

Built client health dashboards combining NPS, activity, and revenue.

2

ENABLEMENT

Moved playbooks into the CRM so guidance lived inside daily tools.

3

FEEDBACK LOOPS

Monthly CX x Product sync: top 3 client insights → feature tweaks.



IMPACT: Improved retention and upsell velocity — and created a tighter partnership between ops and product.

MEASURING SCALABLE SUCCESS

1

CLIENT
SENTIMENT

NPS/Renewal

+10 points gain by segment
20% Increase NRR/Expansion

2

EFFICIENCY

CSM:Client Ratio/Automation Rate

+15-20% Capacity

3

CONSISTENCY

Experience variance across tiers

Down by 20%

4

TEAM HEALTH

eNPS/Turnover

+10% engagement/satisfaction
improvement

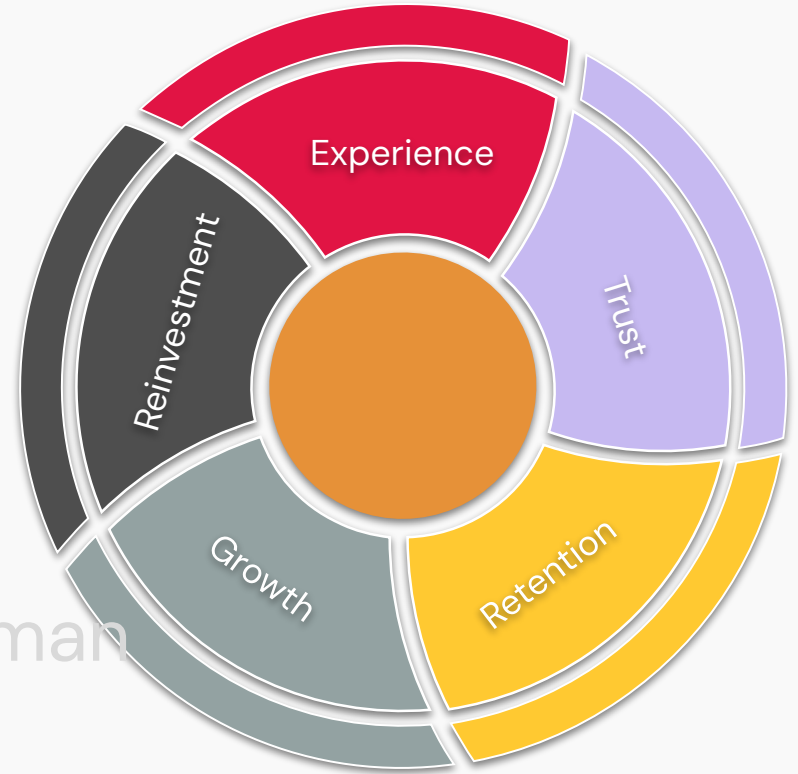
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FLYWHEEL OF SCALABLE TRUST

When experience drives trust, growth compounds naturally.

Our goal isn't to do more — it's to do *what matters most, consistently* at scale.

This flywheel mindset turns every client into an advocate and every team into a growth engine.



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