Clarizen and Gainsight Integration

Incorporate your Services Team into your Customer Success Strategy

clarizen | Gainsight

Does your Customer Success Organization often feel they have little insight into the customer's experience during onboarding or professional service engagements? Do you need a better method to keep Sales, Services and Customer Success aligned throughout the customer's lifecycle?

Maintain transparency and alignment across all teams to ensure your customer has a consistently excellent experience with an integregation between Clarizen and Gainsight.
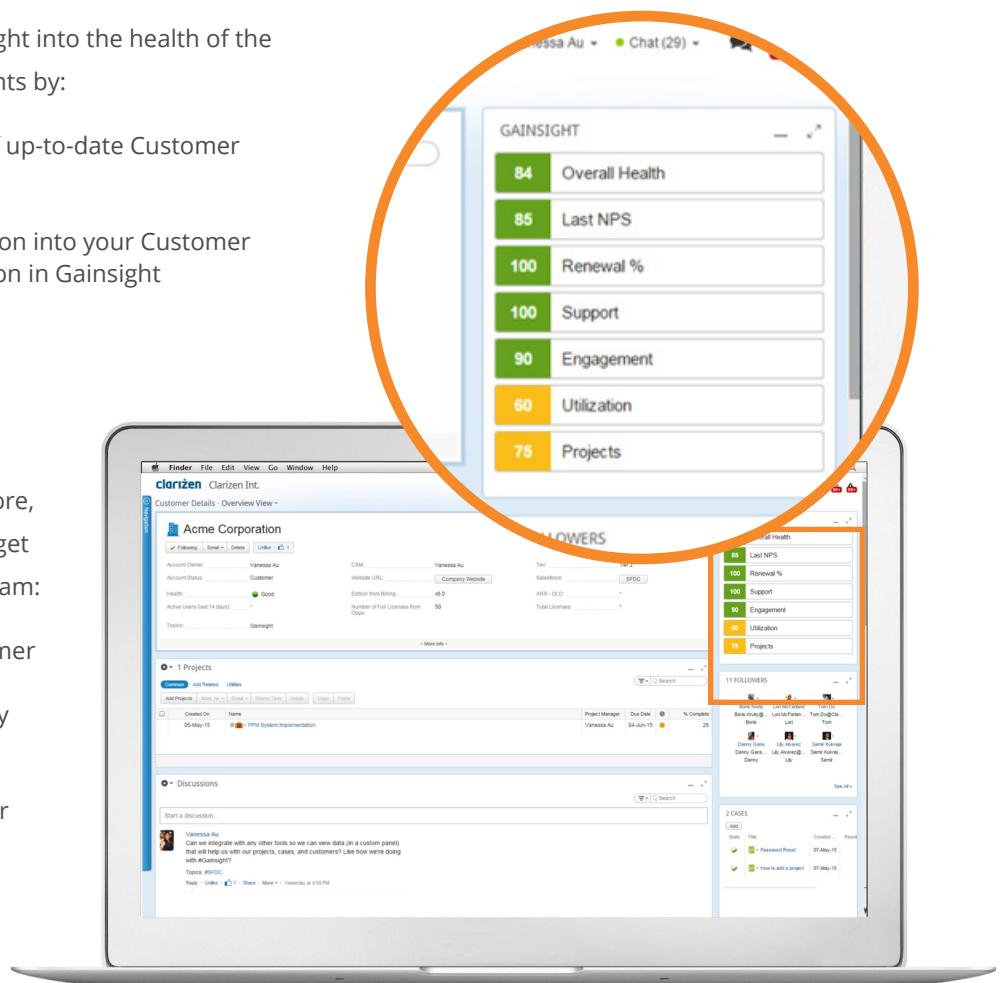
About the integration

The integration provides continuous insight into the health of the customer throughout project engagements by:

- Displaying a Gainsight Widget of up-to-date Customer Success data in Clarizen

- Incorporating Clarizen information into your Customer Success strategy and taking action in Gainsight

Gainsight in Clarizen

Display the customer's current health score, usage and Calls-to-Action (CTAs) in a widget and reports in Clarizen so the Services team:

- Has the full picture of the customer

- Can easily find and reference key milestones with the customer

- Acts in unison with the Customer Success Team on any existing initiatives or escalations

---

www.clarizen.com   **0044 203 411 40 44**   info@clarizen.com
www.gainsight.com   **1.800.623.8562**   info@gainsight.com
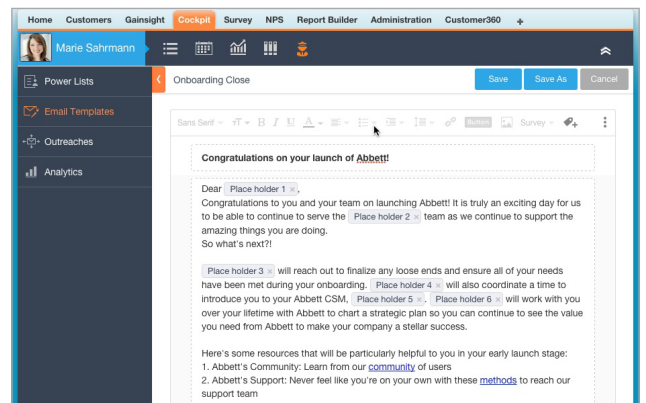
Clarizen in Gainsight

Leverage Clarizen's Salesforce Sync to pull Clarizen data into Gainsight and combine the best practices of Customer Success and collaborative work management to:
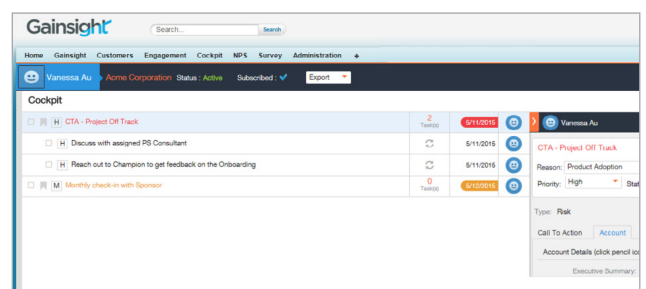
1 Integrate your Clarizen Social Sync with Salesforce Chatter to ensure communications are complete and effective across all teams.

2 Incorporate reports on your Clarizen Projects into the C360 and your existing dashboards to bring the management of the Project into context with all your Customer Success efforts.

3 Use a Feature Checklist to be populated by Sales to indicate what the customer has bought and, once the engagement is complete, updated by Services to show what was implemented. Never again have your Customer Success Org comb through Contracts to understand what was sold and troll through the customer's instance to divine what was enabled.

4 Send an automated and personalized email message to customers when they reach an important Project Milestone or complete their Project. For example, email them to share your excitement at their completion of onboarding with your product, let them know the next steps, who they can expect to hear from and useful resources for a just-launched stage.

5 Create a Scorecard measure that represents the state of their current ongoing Project.

6 Initiate a CTA within Gainsight's Cockpit when a Milestone becomes delayed or a Project goes Off-Track. Use a CTA Playbook to standardize coordination across Services and the Customer Organization to quickly and efficiently organize the appropriate response to get the Project back on-track.
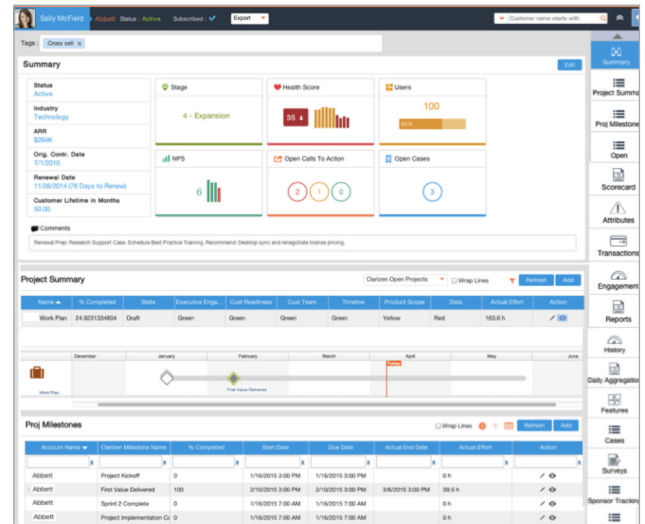
Clarizen Project Roadmap and a report on Project Milestones on the C360

Congratulatory email for a newly launched customer

CTA for delayed Project Milestone

---

clarizen | **Gainsight**

www.clarizen.com
www.gainsight.com

0044 203 411 40 44
1.800.623.8562

info@clarizen.com
info@gainsight.com