ChurnZero Customer Success Management Software: Selection, Requirements, and Workflow



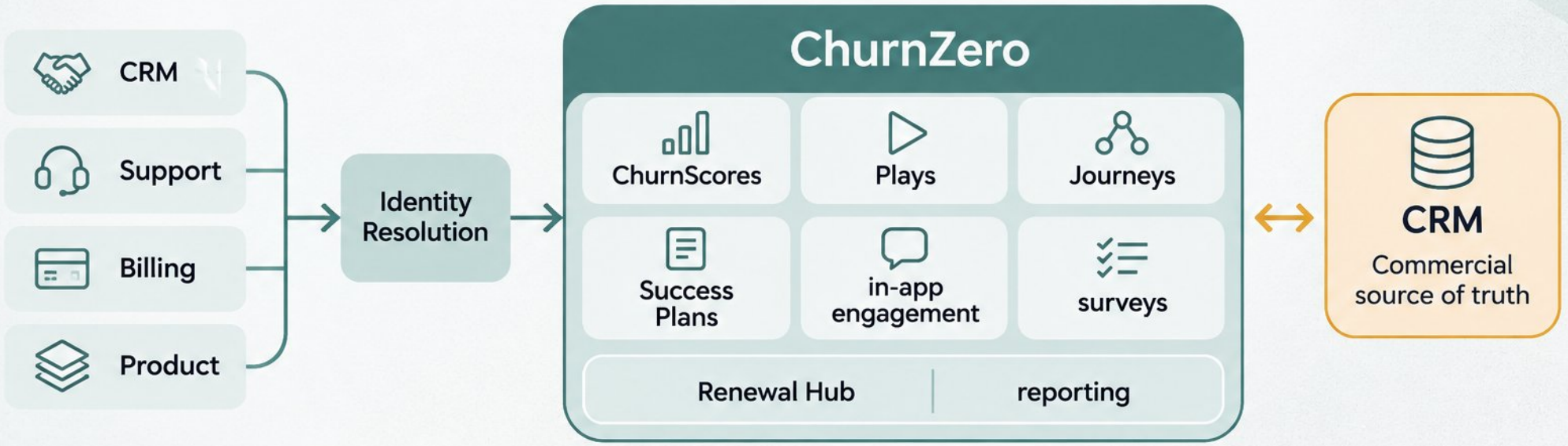
- **Objective:** equip CS leaders, CS Operations, and the implementation team to evaluate, scope, and operationalize ChurnZero
- **Scope:** positioning, AI-era capabilities, selection criteria, requirements, data readiness, workflows, rollout, governance, ROI
- **Why now:** retention pressure, tooling consolidation, and ChurnZero's 2026 shift to agentic AI
- **Format:** five sections ending in a hands-on scoping workshop and a 90-day plan
- **Outcomes:** weighted scorecard, requirements checklist, three mapped workflows, data readiness owner map

Why ChurnZero, and Why Now

- Tighter budgets, higher expectations; boards demand proof of CS impact
- Positioned in 2026 as ‘the AI platform and partner for customer growth”
- Four pillars: AI agents, automation, engagement, analytics
- Sweet spot: mid-market B2B SaaS, 10–100 CSMs, live in weeks
- Guards against: demo-driven selection, skipped data prep, no platform owner



Platform Positioning and Capability Map



- Core pillars: ChurnScores, Plays, Journeys, Success Plans, in-app engagement, surveys, Renewal Hub, reporting
- Plays: situational, time-bound, message customers. Journeys: account-only guided plans, no outbound messages
- Data consumer, not system of record: CRM stays source of truth for commercial fields
- 50+ native connectors: Salesforce and HubSpot primary bidirectional paths; Zendesk, Snowflake, Stripe, Gong, Slack
- Boundaries: complex multi-org Salesforce and non-recurring-revenue models need extra scoping

Selection Criteria and the Competitive Landscape

- Weight criteria before demos: CS motion fit, data readiness, integration, automation, reporting, security, support
- Alternatives without brand bias: Gainsight for enterprise; Odie/Totango modular; Planhat RevOps-led; Vitally SMB; ChurnZero mid-market speed
- TCO: Vendr median $44.2K/year (range $18.8K–$128.8K), onboarding $5K–$25K+, 3–7% escalators
- Pricing scoping: quote-only, Professional vs. Enterprise, 400 accounts/user with $1 overage, integration caps, AI credits
- Honest test: when a dedicated CS platform isn't the right answer yet



Weighted Decision Scorecard

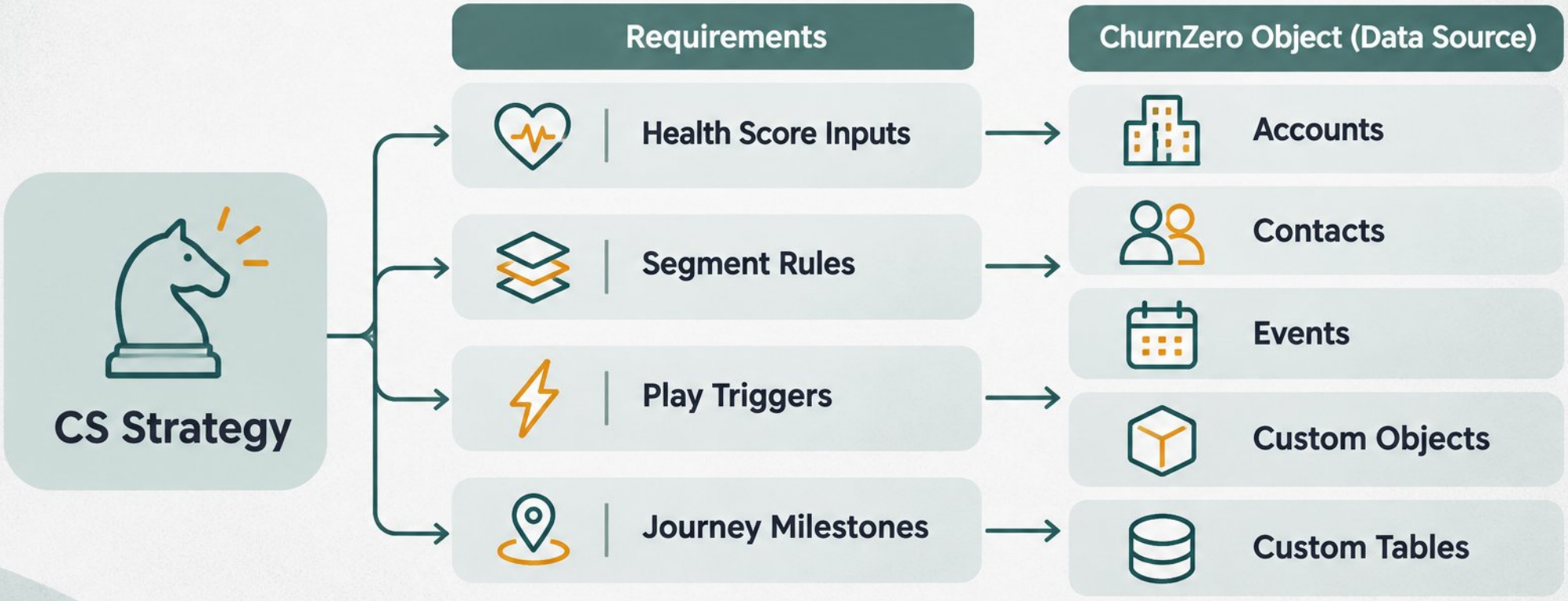
Criteria	Weight	Gainsight	Totango/ Odie	Planhat	Vitally	ChurnZero
CS motion fit		✓	✓	✓	✓	✓
Data readiness		✓	✓	✓	✓	✓
Integration		✓	✓	✓	✓	✓
Automation		✓	✓	✓	✓	✓
Reporting		✓	✓	✓	✓	✓
Security		✓	✓	✓	✓	✓
Support		✓	✓	✓	✓	✓



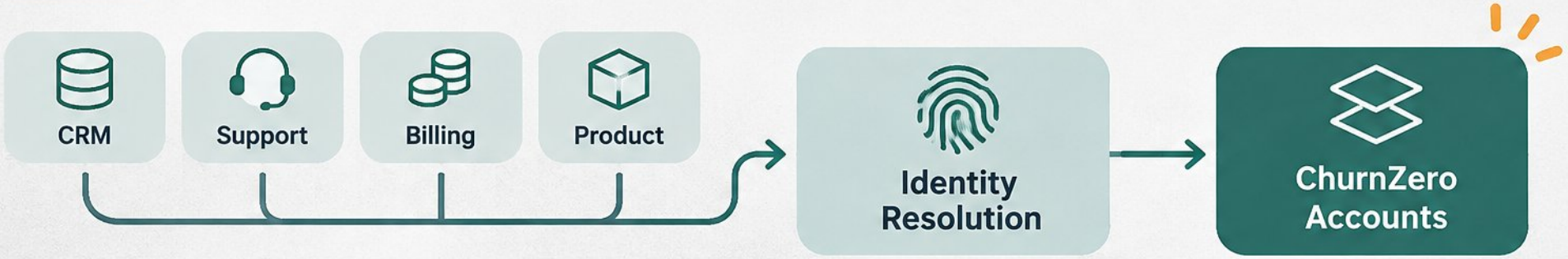
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From CS Strategy to Functional Requirements

- Translate strategy into requirements: health score inputs, segment rules, play triggers, journey milestones, renewal signals, reporting.
- Set health score rules: six to ten weighted factors, summing to 100, multiple scores by segment.
- Map every requirement to a ChurnZero object: Accounts, Contacts, Events, Custom Objects, Custom Tables.
- Only Accounts can be segmented, trigger Plays, run Journeys, receive NPS, and drive ChurnScores.
- Custom Tables only feed segments and alerts — document these limits explicitly.
- Record field-level source-of-truth ownership in a traceable spec the implementation team can execute.



Data Readiness and Non-Functional Requirements



ID Alignment and Hierarchy Prerequisites

- Identity first: AccountExternalID and ContactExternalID must match across CRM and product
- Never use customer names as IDs; Salesforce IDs must be the 18-digit form
- Parent/child hierarchy syncs from CRM or API; child usage does not roll up
- Plan parent-level ChurnScores using the average of child scores
- QA before configuration: active/churned definitions, completeness, refresh cadence

Security and Non-Functional Requirements

- Security: SSO, role-based access, audit logs, SOC 2 Type II, ISO 27001, AI opt-out
- Name a primary data contact and a primary build contact before kickoff

Primary Data Contact

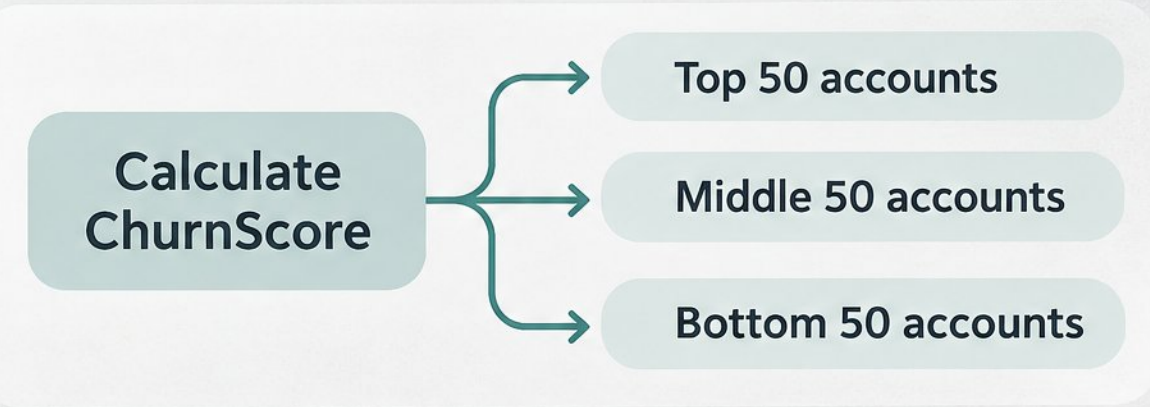
Primary Build Contact

Health Score Architecture in Practice

- ChurnZero scale: 0 = low risk, 100 = high risk; green/yellow/red default
- Seven-step build: segment, define behavior, pick 6–10 criteria, weight, grade, act
- Build multiple scores: onboarding, adoption, renewal, at-risk differ by segment
- Validate with Calculate ChurnScore: check top, middle, bottom 50 accounts
- Review monthly early, then quarterly; explain weights so CSMs trust scores

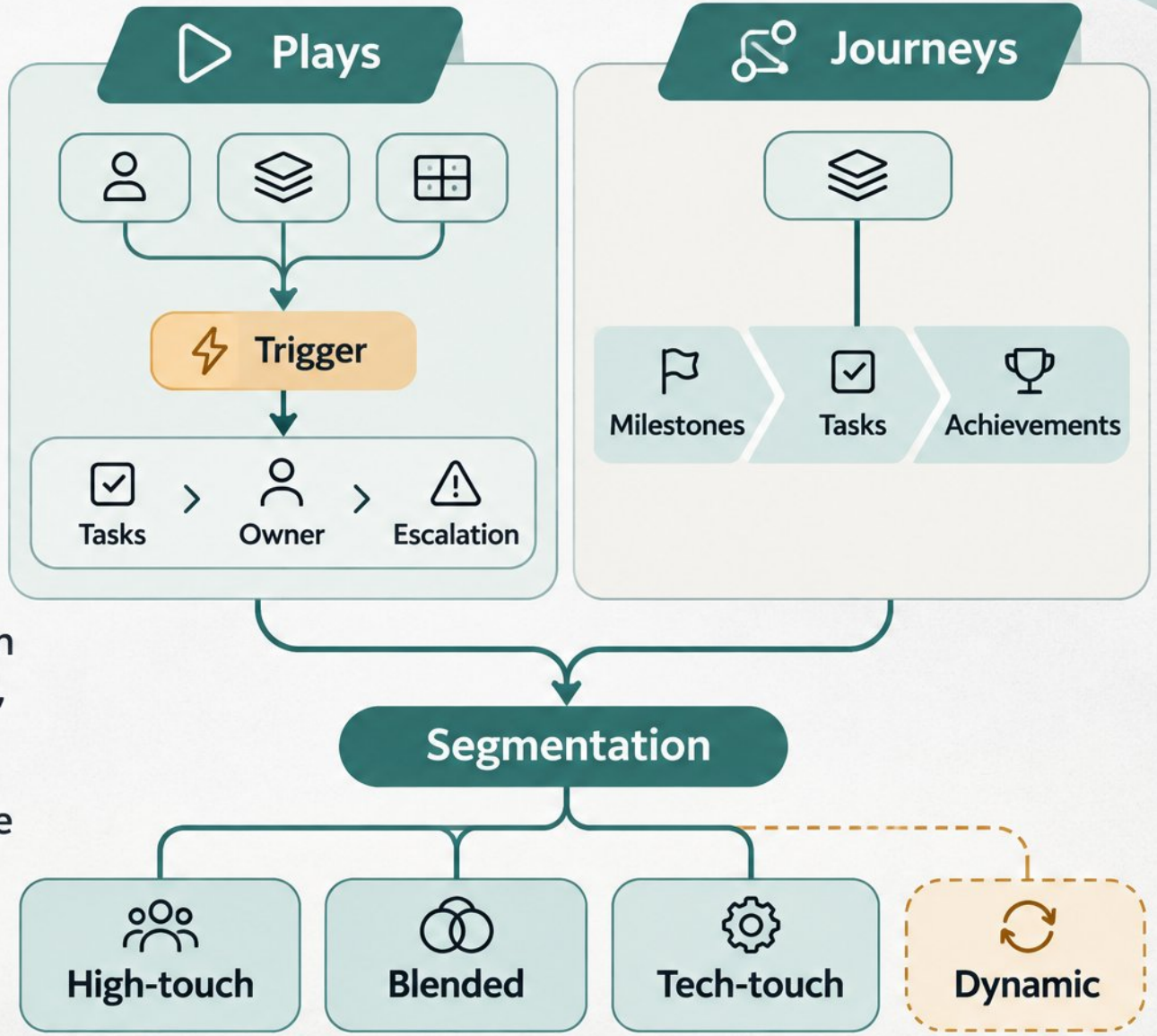




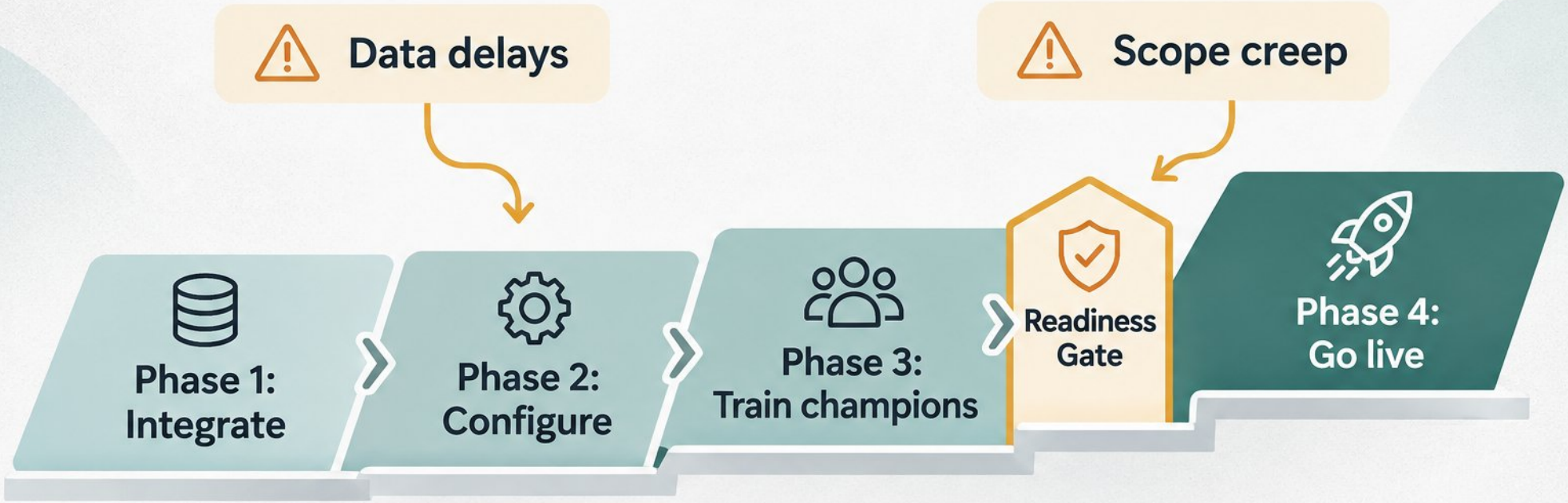


Workflow Design: Plays, Journeys, and Segmentation

- **Plays:** one-time vs. continuous; contact, account, or custom table targeting
- Every play needs trigger, conditions, tasks, owner, escalation, and success metric
- **Journeys:** account-only guided plans with milestones, internal Tasks, customer Achievements
- **Segmentation** sets automation intensity: high-touch, blended, tech-touch, dynamic
- **Launch guardrails:** two or three workflows, a handful of alerts, review gates on AI steps



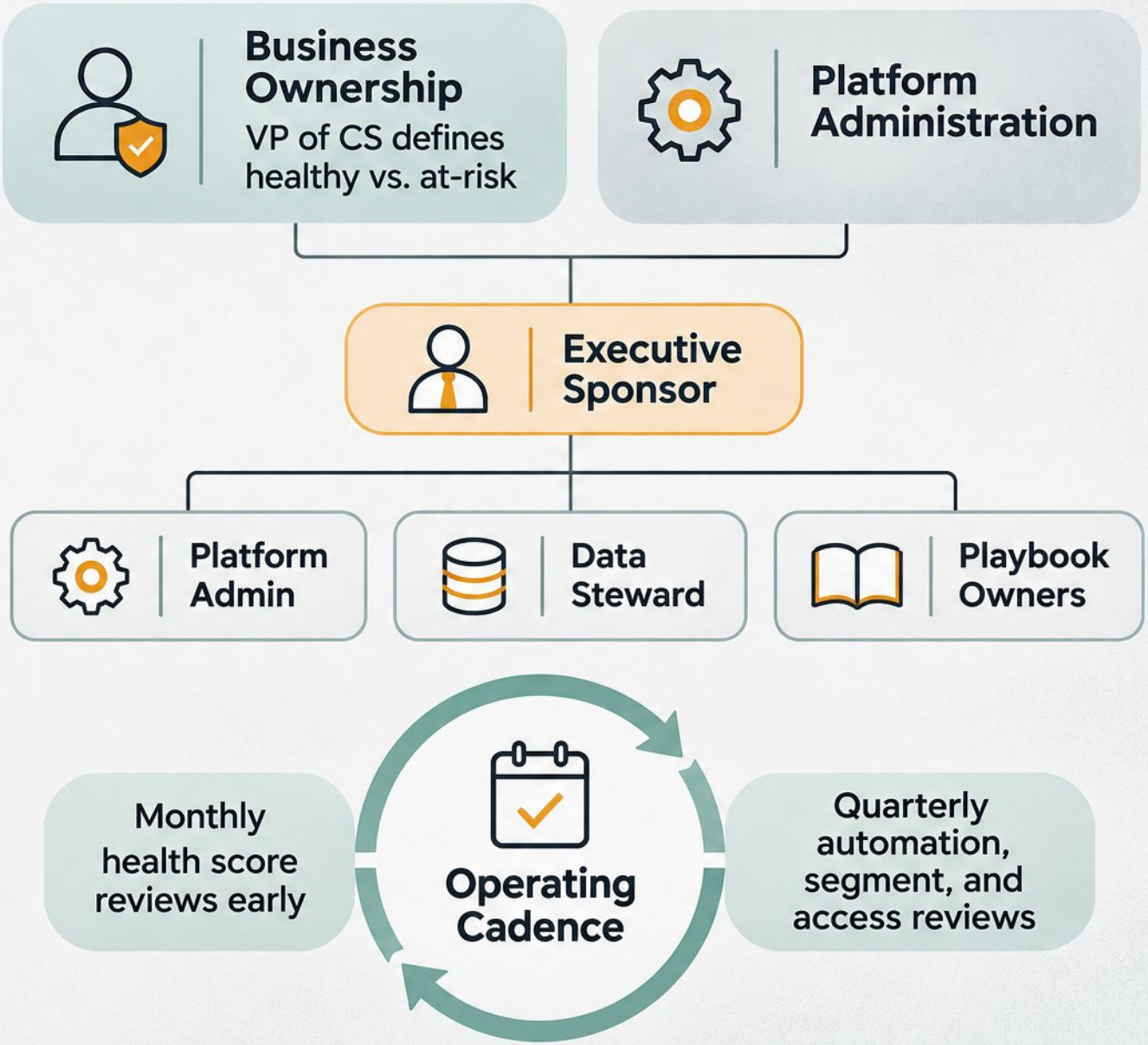
Implementation Roadmap and Phased Rollout



- Phase 1: Integrate data and test on real production data
- Phase 2: Configure only two or three priority use cases first
- Phase 3: Train CSM champions; ask, "Could you do your job tomorrow?"
- Phase 4: Go live by segment or workflow, then expand
- Four to eight weeks is realistic only when data is ready
- Name one project manager as the single vendor contact
- Adoption needs role-specific enablement and feedback loops, not one session

Governance, Administration, and Ownership After Go-Live

- Business ownership defines healthy and at-risk; platform admin keeps the system running
- Minimal CS Ops model: platform admin, data steward, playbook owners, executive sponsor
- Monthly health score reviews early; quarterly automation, segment, and access reviews
- Post-go-live backlog via CSM feedback, prioritized quarterly against business objectives
- Without clear ownership, platforms decay into another tab nobody trusts



Measuring Success and Building the ROI Case

- Capture baselines pre-go-live: CSM prep time, time-to-value, NRR, churn, forecast accuracy
- Write 1–3 from→to outcomes (e.g., 10→6 hours/week in 12 months)
- Track leading adoption: play completion, health score coverage, alert response time
- Attribute results to workflows, not the tool — isolate from market shifts
- Proof points: SPINS 54% at-risk revenue drop; DDI $1.2M ARR from 20 saves; FreeWill +27% logo retention



From→ to outcomes

Write 1–3 from→to outcomes (e.g., 10→6 hours/week in 12 months)

	Baseline		Target
CSM prep hours		→	
NRR		→	
Churn rate		→	
Renewal win rate		→	

Leading adoption

Track leading adoption: play completion, health score coverage, alert response time

Proof points: SPINS 54% at-risk revenue drop; DDI $1.2M ARR from 20 saves; FreeWill +27% logo retention

Hands-On Workshop: Scoping Your ChurnZero Deployment

Weighted Scorecard

Criteria	Score

Workflow Mapping

Onboarding
Type:
Target:
Trigger:
Owner:

At-risk
Type:
Target:
Trigger:
Owner:

Renewal
Type:
Target:
Trigger:
Owner:

Data Readiness Gap Table

	Owner	Due Date
IDs		
Hierarchy		
Usage Events		
Commercial Fields		

- Exercise 1: Requirements checklist plus weighted selection scorecard, benchmarked against alternatives
- Exercise 2: Map onboarding, at-risk, and renewal workflows to Play or Journey designs
- Exercise 3: Data readiness assessment covering IDs, hierarchy, usage events, commercial fields
- Peer review against facilitator answer key with common-pitfall flags
- Output: Draft 90-day implementation plan per team, with milestones and go-live criteria

Common Pitfalls and Decision Checkpoints

Selection pitfalls:

- demo polish over fit, underestimated setup effort, buying ahead of process maturity

Configuration pitfalls:

- full lifecycle automation day one, generic play tasks, opaque health score weights

Data pitfalls:

- misaligned external IDs, incomplete hierarchies, unresolved QA gaps corrupt scores

Confirm by session end:

- [x] weighted criteria
- [x] named platform owner
- [x] data owners
- [x] pilot segment
- [x] two launch workflows

Governance gate:

- security review and AI data-handling answers complete before signing

Key Takeaways and Next Steps

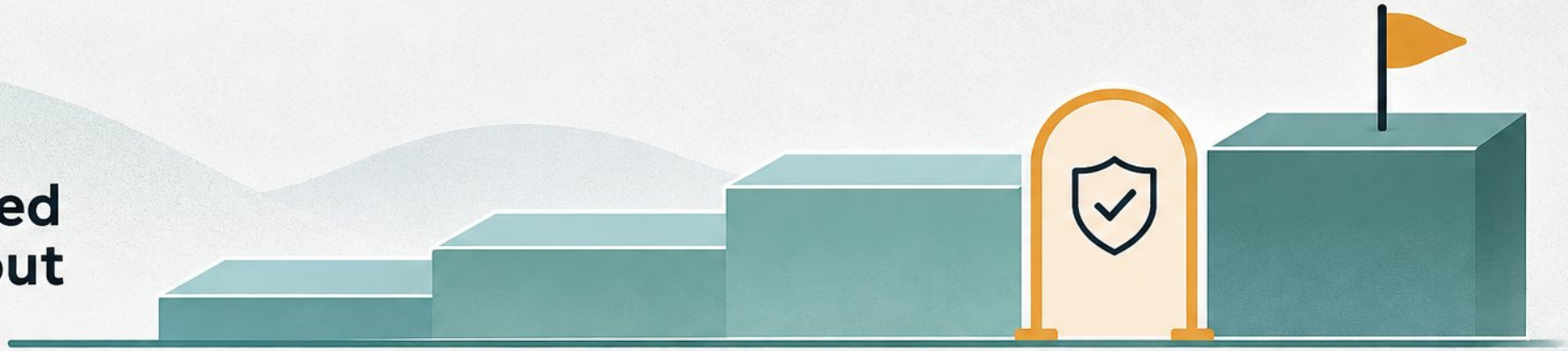
Three decision threads: weighted selection and TCO

Three decision threads: traceable requirements with data readiness

Three decision threads: score/ play/journey design

- Lock the scorecard, name data and build contacts, schedule pilot scoping, book security review
- Follow-up: support docs, health score handbook, Implementation Worksheet, Salesforce questionnaire, your specialist
- Sustain momentum: monthly score reviews, quarterly automation audits, standing ROI narrative for Finance
- Open Q&A plus a follow-up channel for post-session implementation questions

Phased Rollout



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