



CustomerSuccessBox

CASE STUDY

# B2B SaaS Customer Retention

Size: Mid Market

Industry: Ed Tech

Headquarters: India 



SchoolPad identifies at-risk accounts within 2 weeks of signing up with CustomerSuccessBox and prevents potential churn

## About SchoolPad

SchoolPad is on a mission to help Schools progress better by making teachers more productive on their day to day administrative tasks and at the same time improving the levels of parental involvement through better parent-teacher communication.

They feel that technology today can act as a powerful enabler for School Education. Building simple yet powerful technology tools and delivering an awesome overall experience in terms of helping schools use these tools to their best is what SchoolPad strives for.

Their passion to help and empower their customers and belief in technology is what brought them to CustomerSuccessBox.

*“We were surprised to identify accounts on the verge of churn when the health data started showing up in CustomerSuccessBox. With the risk alerts notifying the success team early, we now have the opportunity to prevent potential future churn. We’re truly getting of the churn”*

Abhiraj Malhotra

Founder and CEO, SchoolPad

## The Challenges

### Reactive customer success:

SchoolPad had a detailed customer onboarding in place and was able to successfully onboard most customers by following a defined process. Customer success managers (CSMs) were running the process well during the onboarding, but post onboarding they were solely relying on the customers to reach and ask for support. Running a reactive success team meant that churn could potentially come in as a surprise and by the time the team intervened it was already too late.

## How CustomerSuccessBox Helped

### ✓ Risk alerts:

With CustomerSuccessBox, SchoolPad was able to calculate Account Health and set up Risk Alerts early based on telemetry data which reflected real product adoption.

### ✓ Identifying at-risk accounts with partial usage:

SchoolPad was aware of the few non usage accounts, but the hard to catch were those customers who were using the system partially. This meant they were less sticky and were at the higher risk of switching to a competitor. They were able to identify **around 30 accounts** within 2 weeks of signing up with CustomerSuccessBox. While talking to those customers, CSMs found that they were not even aware of the advanced functionality that SchoolPad offered, and hence were vulnerable to a switch to competition.

### ✓ Preventing future churn:

With the problem of identifying at-risk accounts solved, CSMs were now able to intervene, re-educate and train both the users as well as sponsors for the additional use cases, thereby preventing potential future churn.

## About CustomerSuccessBox

CustomerSuccessBox is the leading customer success platform for B2B SaaS which helps deliver success across all customer lifecycle stages. It empowers every CSM to manage hundreds of accounts while growing a multi-million dollar portfolio, lowering the cost of delivering success per customer. Thereby enabling customers even with lower ARPA to enjoy the benefits of a customer success program. Founded in 2016 by Puneet Kataria and Amritpal Singh, CustomerSuccessBox raised \$1Mn in 2018 in a Pre Series A round of funding led by pi Ventures and Axilor Ventures.

Leading customer-centric enterprises such as Pipedrive, Raken, Locus and Headset.io use CustomerSuccessBox to drive product adoption, retention, and expansion. To learn more, visit [customersuccessbox.com](https://customersuccessbox.com).