Anatomy of Customer Success

Healthcare organizations are working with lean staff and watching costs more closely, so when a software platform is implemented, it needs to be as successful as possible. Hybrent's Customer Success team was created to keep customers aligned with their goals while maximizing their software usage. Our team works closely with customers to review their goals, optimize the software for their organization, and inform them of upcoming new features.

How Success is Managed

When a customer implementation is completed, Customer Success begins tracking their software usage and statistics. We monitor for six months and at that time, we set up a success call to review their goals and answer questions. We also send a customer success survey to measure their satisfaction with the platform, service they are receiving, and what they would like to see in future releases.

Our success calls cover four areas:

Statistics

What has been the compliance of the users on the platform? We review metrics covering total purchase orders placed, receiving, importing among other items. We can track how items are moving through the system and where there is potential for more efficient processes.

Existing Issues

We discuss any pain points customers may be experiencing, most of which are solved by some quick training, often while on the call. We discuss any enhancement requests they may have. Sometimes these are easy requests that are placed in a queue for quick resolution, or they are documented and reviewed with our larger technical team. We can also establish additional training plans while on the call and forwarding customers a link to sign up when convenient with their schedule.

Documented Goals

In reviewing a customer's goals, we ask several questions to learn if the platform has met, exceeded or not met their goals. If any goals have not been met, we discuss why and how to fix them, and create a customer journey map to make sure they have a plan to achieve those goals. Sometimes the goals have changed based on what they've learned the software can do or priorities for the organization shift and subsequently goals shift as well.

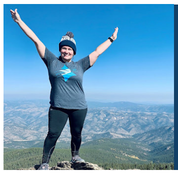
We also help customers achieve their goals. For example, if they want inventory management, we get them set up for our training webinars. We check in after the training to make sure they've completed them and if they need further support on that goal.

New Features

One of the best parts of Customer Success is providing our customers a high-level overview of some of the new features of the platform. When customers are curious to learn more about these features, we have the ability to share our screen and walk them through it using their own instance of the system during the meeting. Seeing their own information helps them understand the process better. We can also create how-to videos for them to use as a reference and share with colleagues learning the system.

One feature that comes up on the calls quite often is reporting. After customers have been using the software for a few months and are much more comfortable with it, reports become a higher priority because now they have a solid foundation of data from which to pull. We take this time to review the overall reporting functionality, the many different types of reports they can run and how to personalize the report view so it provides them with actionable insights.

When researching software companies, healthcare organizations should make it a priority to choose one that has a Customer Success team. The proactive engagement offered ensures the time and money invested in the system will reap the most benefits for the customer, which is always their (and our) number one goal.



Calli Whitehouse, Director of Customer Success- With a background in customer service and success, Calli ensures that customers are happy with our software and are using it to its fullest potential. In her off hours, Calli can be found ice climbing or hiking, often with her canine companion in tow.