TEAM SUCCESS
REVENUE FOCUSED CUSTOMER SUCCESS SOFTWARE.

TeamSuccess.com

FAQs

Answers to your questions and concerns

What data integrations are available?

The ability to import TeamSupport customer, contact, ticket data, NPS, CSAT, invoice, and subscription data via CSV.

What health metrics can I track?

Total number of submitted tickets, number of critical unresolved tickets, CDI, NPS, CSAT, churn candidate, and days since last touchpoint.

What customer segments can I create?

Playbook, number of licenses, plan, billing cycle, churn candidate, NPS, CSAT, ARR, MRR, and Health Score.

Can a customer be assigned to more than one CSM? Yes.

Can I bring only certain customers into TeamSuccess from TeamSupport?

Yes. As part of the integration settings you can choose multiple fields to filter by, including customer custom fields. For example, if you had a custom field that denotes if a customer record is a trial customer, and you only want to import non-trial accounts, you can filter based on that custom field to exclude trial accounts.

What is the difference between the CSM and CSM Manager role?

A CSM Manager will be able to see a CSM dropdown menu which will allow the manager to view the CSM's customer portfolio and revenue dashboards. A CSM will only see their assigned customers in the portfolio and revenue dashboards; they can search for other customer records belonging to another CSM and view them.

How do you manage product subscriptions and renewals?

We allow for manual subscription management where the CSMs must specify if the customer's subscription will be renewed or churned. We also allow for automatic subscription renewal where the customer's subscription will be renewed automatically on their renewal date.

What automations are available?

Upon release, the ability to add a customer to the playbook, create a task, assign tasks to a CSM, send an email, or create an alert will be possible.

**Contact TeamSuccess today by calling 800.596.2820 ext. 1
or email Sales@TeamSuccess.com**