Case Study
Driving Adoption & Retention Through Outcome-Oriented Onboarding and AI-Powered Engagement

To accelerate adoption and reduce churn risk, I led the development of a scalable, data-driven customer engagement strategy grounded in customer journey mapping and powered by Segment as our CDP. This cross-functional effort was a close collaboration between Services and Customer Success: Services focused on implementation, while Customer Success drove strategic engagement, guiding customers toward activating high-impact use cases that delivered measurable business outcomes.

The initiative required both creative problem-solving and structured change management—transforming our onboarding model and engagement strategy while aligning multiple teams around a shared customer success vision.

Business Risk

- Only **31%** of customers were achieving "healthy adoption" by month six
- Customers who hit "healthy adoption" are **2x** more likely to renew
- **35%** of our churn was "surprise" churn, hindering our ability to provide accurate financial forecasting

Shift Onboarding to Use-Case Centric Activation

Through a curious and customer-first lens, I reimagined our onboarding from open-ended technical implementation to structured use case activation. We introduced templated frameworks aligned with common business objectives—such as lifecycle orchestration and personalized messaging—allowing customers to realize value faster.

- Embedded **use case milestones** into onboarding journeys
- Mapped **onboarding success criteria** to product capabilities and business KPIs
- Anchored onboarding success around time to value, not just technical completion

Impact: Accelerated time-to-value from **15 months** to **3 months**.

Average time to first use case
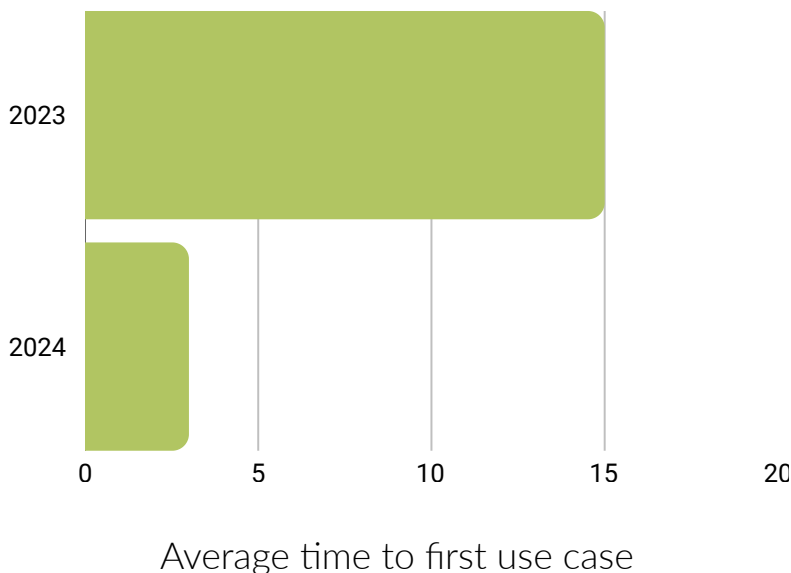
Built Unified Customer Journey Maps

Applying creative systems thinking, I led the development of a comprehensive customer journey map spanning onboarding, activation, risk detection, and expansion. The journey map provided a shared language and operational guide across teams.

- Defined **journey stages** and associated success metrics
- Aligned lifecycle progress with product usage and onboarding health data
- Created intercept moments for both human and automated

Impact: Defined roles and responsibilities, enabling us to increase territories by **1.6x** while continuing to improve retention.

Activated Segment CDP for Real-Time Signals

Using Segment, we centralized product telemetry, onboarding task data, and CRM attributes into a real-time profile. This allowed us to track adoption progress, identify risks, and segment customers by lifecycle stage.

- Build a **unified customer profile** using Segment, Salesforce, Snowflake, and more
- Enabled **predictive scoring** tied to use case activation and renewal risk
- Triggered **automated journeys** and campaign flows from this data

Impact: Surfaced early warning signs and enabled targeted interventions at scale.

Deployed AI-Powered Campaigns to Drive Adoption

Partnering with Marketing and Ops, I launched targeted, AI-powered campaigns using Segment's generative audiences. These campaigns nudged customers through key adoption stages based on their behavior, lifecycle position, and industry.

- Used generative AI to create **dynamic audience segments** and test engagement strategies
- **Personalized messages** by industry, persona, and onboarding stage
- Integrated into Snowflake and Salesforce to surface insights to CSMs

Impact: 60 - 80% open rates and **24%** more customers achieving onboarding milestone completion.

Scaled High-Touch Engagement Model with Playbooks, RACI Alignment, and Use Case Enablement

To operationalize proactive customer success and strengthen retention in our enterprise segment, I implemented a high-touch engagement model backed by a structured RACI framework. This initiative required substantial change management across teams, including a mindset shift from reactive support to outcome-led partnership.

- Trained CSMs to use the **use case framework** not just in onboarding, but throughout the lifecycle to reinforce value and drive growth
- Developed structured plays for stakeholder multi-threading, usage **expansion**, and executive sponsorship
- Established a clear cadence for CSM-driven health reviews and strategic account planning
- Combined human-assessed health scores with AI-driven telemetry to **improve early risk detection**

- Achieved **100%** enterprise account plan coverage within the first quarter

Impact: Surprise churn dropped from **35%** of total churn to **8%**, forecasting improved, and CSMs became more strategic and commercially effective.

Conclusion

This initiative combined creativity, collaboration, and execution to reimagine our customer journey—from onboarding through expansion. By anchoring our strategy around business outcomes, activating AI and CDP intelligence, and transforming team behaviors with structured playbooks, we significantly improved adoption and retention outcomes.

- Month-six adoption health: ↑ **from 31% to 55%**
- Time to first use case activation: ↓ **from 12–18 months to 3–6 months**
- Net Revenue Retention: **119%** (use case framework) vs**. 90%** (baseline)
- Campaign open rates: **60–80%**
- Surprise churn: ↓ **from 35% to 8%**
- Enterprise account plan coverage: ↑ **to 100%** within one quarter
- Renewal rates: Improved from **71% to 82%** Q1'24 to Q1'25

Renewal Rates (including Q2'25 projected)