



A guide to managing customer relationships at scale

How to empower your customer success team to give a
better experience by managing your communications in Front



INTRODUCTION

Email wasn't built with customer success teams in mind.

Customer success teams rely on email more than any other tool. Whether you're onboarding customers, scheduling training sessions, planning for long-term goals, or just checking in to say, "Hey, how's life?", email is the easiest, most reliable way to reach your customers. But email wasn't designed to help customer success teams do their best work.



INTRODUCTION

Why doesn't email work well for customer success?

1. It isn't collaborative.

Emails get trapped in one person's inbox, so the rest of the team has no insight into customer conversations. There's no way to work together without CCing, forwarding, and creating even more email.

2. It lacks accountability.

Emails get lost in the abyss of individual inboxes and group email accounts, where there's no clarity around who answers what.

3. It doesn't connect with other apps.

We have to switch back and forth from email, to CRMs and CSM solutions to reference and update customer information. We also have to manage other customer communication channels like live chat, SMS text, or social media messages, separately.

Email has turned customer success into a balancing act. Teams juggle messages across different platforms and information scattered throughout multiple databases and apps. Ultimately, it's tough to connect the dots around customers.

Customer success teams need an inbox that enables them to work collaboratively and efficiently, so they can focus on what matters: taking care of customers.

That's where Front comes in. Front is a collaborative inbox for teams that brings your email, customer communication channels, and apps into one place. You can work together with your team to manage customer messages from every touchpoint — like email, support tickets, social media, and live chat — in one inbox, with your critical customer data from other customer success tools available alongside it.

In this ebook, we explore how you can manage email, plus all your other customer communications, in Front, so your team feels empowered to give a better experience.



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01

Paint the full
picture of every
customer



Paint the full picture of every customer

Customize your inbox to fit your team

Jumpstart your team's productivity

Give a consistent experience across the customer journey

Unlock insights to improve customer experience

Customer success is a dynamic and demanding role. It requires constant attention to customer needs, strategic thinking to find long term solutions, and genuine care to help customers achieve their goals.

Luckily, there are plenty of solutions that help customer success teams get work done — communication platforms, data retention tools, software to track customer health, and more. Although these tools are beneficial, they also create a problem: customer information is all over the place.



Emails with customers: Your email conversations with customers hold important context about their needs.

Emails about customers with your team: The internal conversations you have with teammates about customers can have information about customers, too.

Other communication channels: If you communicate with customers over live chat, social media, or SMS text, critical context lives in those channels, too.

Other apps and tools: If you use CRM or CSM software, these apps hold key customer details like contact information, pricing plan, engagement, health scores, and more.



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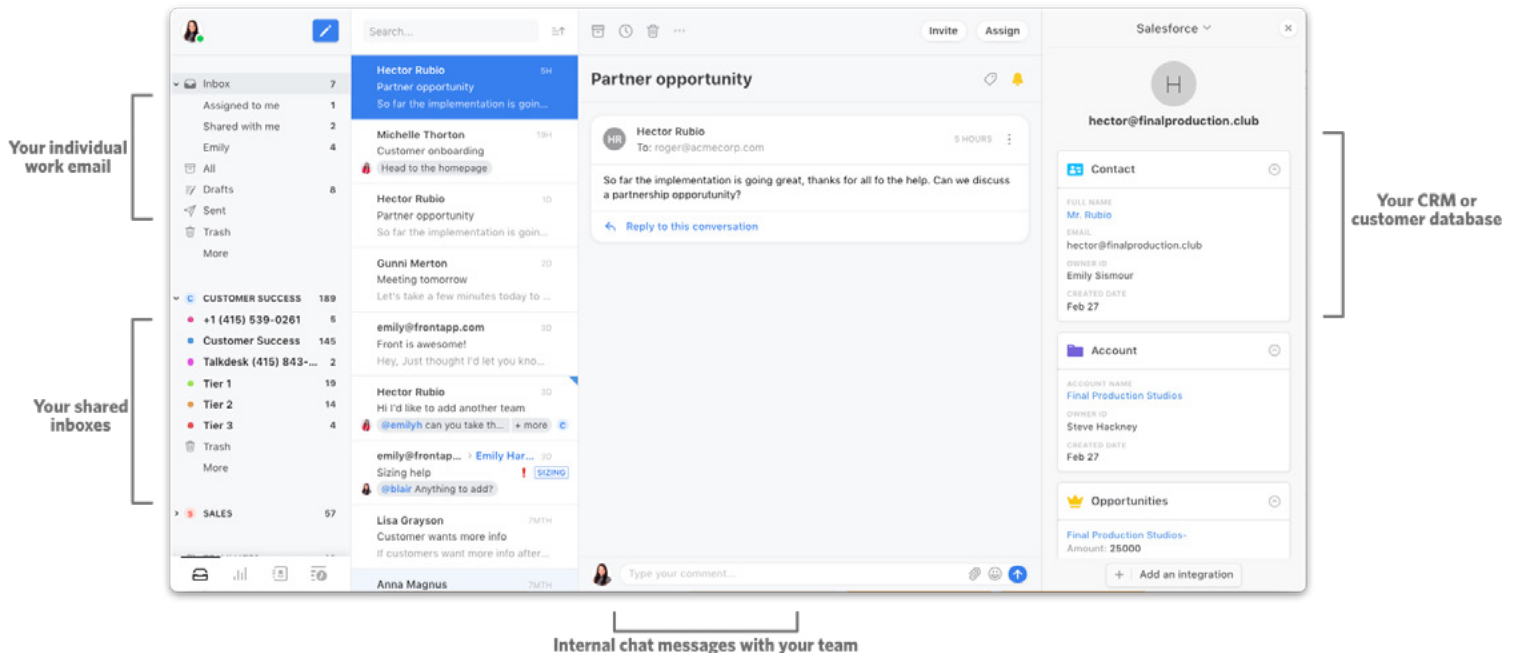
Give a consistent experience across the customer journey

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Bring everything you need into one inbox

Front brings your customer communication, team communication, and customer data into one inbox, giving you the context you need to connect with customers. From email, support tickets, live chats, social media, to your CRM, you can access every customer interaction in one place. That way, you get insight into previous customer conversations, understand the full picture of every customer you're talking to, and save time since you're working from a single tool.

Armed with more customer knowledge and increased efficiency, Front gives your team the time and context to move from reactive to proactive customer relationships. Instead of waiting for customers to come to you, you'll have time to reach out and engage them.





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Unify your communications to deliver a better experience

A single inbox

Bring your communication channels into one inbox, so you have a central view of all your customers in one place:

- Your individual work email
- Group emails like team@ or success@
- SMS text messages from Twilio
- Social media messages from Twitter and Facebook
- Live chat messages with your website visitors
- Reviews from customer rating sites like Google Play Store
- Voice messages like Talkdesk calls and voicemails

Internal conversations

Collaborate with your team by assigning messages to the right account owner and leaving internal comments and notes on conversations:

- @mention teammates to collaborate directly
- Keep track of internal conversation history

Customer information databases

Connect Front with your apps to access customer information and keep your accounts updated, directly from your inbox:

- Salesforce, JIRA & Base
- And 40+ apps



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COUNTSY

CUSTOMER SPOTLIGHT

Countsy Client Services Team

How Countsy handles high email volume while giving a high-touch customer experience

Challenge

Countsy's 100+ remote consultants manage a high volume of critical, time-sensitive customer requests for their backend accounting service. With Microsoft Outlook distribution lists, the team lacked accountability. It was hard to tell who was responsible for answering emails, their response times were slow, and messages fell through the cracks.

Solution

The Countsy team has 200 shared inboxes in Front, with one shared inbox for each client. By clicking into any client's inbox, consultants get visibility into every past conversation and can quickly get up to speed on every request. They use Front's assignments feature to establish clear ownership for every message. Consultants manage their individual work email in Front, too, so all their customer information and messages live in one place.

Results

Their entire 100+ person team works in Front 24/7. Every customer, consultant, and executive has insight into what's going on with clients, and they can find customer insights faster in Front than they ever could in Outlook. They also send far fewer internal emails by using Front's internal comments feature to message each other.

"When we assign emails to specific people in Front, everyone knows exactly what they're responsible for at a glance."

KATHY COSTILLO
Head of Technology
Service Center, Countsy



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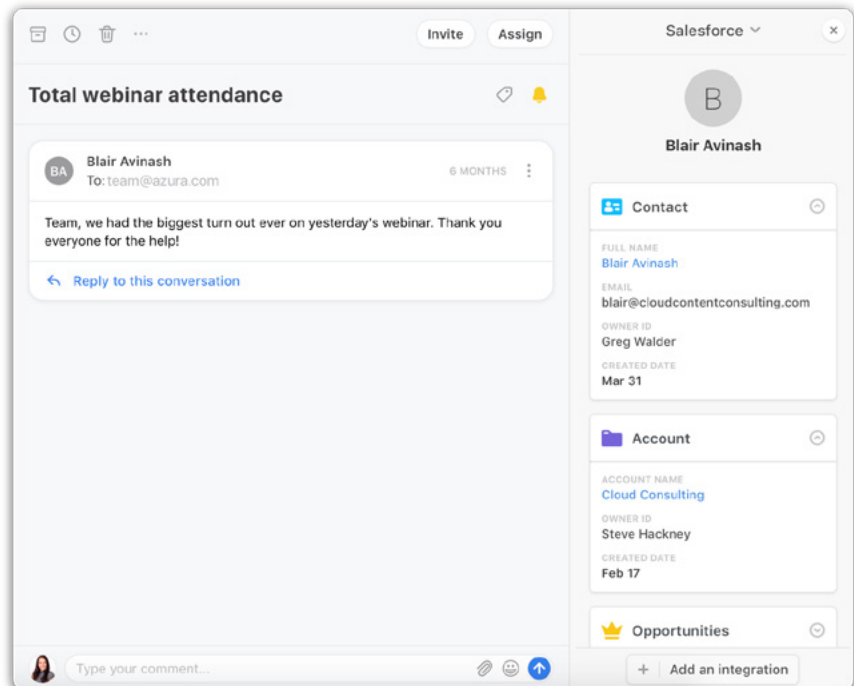
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Integrate customer success tools into your inbox

The average person spends 28 percent of their work week on email, and for customer success teams, that number is often even higher. But all your critical information, like project schedules, customer health data, and more, live in other apps and tools, like a project management software or CRM.

Front brings all those tools directly into your inbox. That way you're not wasting time switching between tabs from your email to your apps to get information. And since Front allows you to access and update your tools in real time, right next to your email, it's easy to keep data up-to-date across every platform.



Right: View and edit customer information in 40+ popular apps and tools, like Salesforce, directly from your inbox in Front.



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Popular apps and tools customer success teams integrate with Front

CRM

Salesforce: Create, view, and edit Salesforce records directly from your Front inbox. Display health scores, CSAT, or NPS as a field in Salesforce, and see it next to every customer message. That way when you go to respond, you've got that key context on your customer and can reply accordingly.

Base: View, create, and update your CRM leads, contacts, and deals directly from your inbox.

HubSpot: Create new leads, display customer information, and log conversations in HubSpot CRM directly from Front.

Pipedrive: Create activities, sync contact details, and display Pipeline deal stages in Front, so your sales team can make the most of every message.

Zoho CRM: Connect your Zoho account with Front to view, edit, and update CRM records related to customer messages. Bring data from your CRM right into your inbox.

Project Management

GitHub: Create new GitHub issues or link messages with open issues from Front. When a GitHub issue is closed, linked conversations will automatically re-open in Front, so you can update customers when a feature is shipped or a bug is fixed.

JIRA: Link messages with open JIRA issues or create new issues right in Front. When a JIRA issue is closed, linked conversations will automatically re-open in Front, so you can update customers when something goes live.



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Customer Satisfaction

Delighted: Save your NPS scores and customer feedback in Front. Front also adds respondents to contact groups for easy follow up.

Nicereply: Ask for customer ratings with every message. With a shortcode snippet in your signature, all customer responses will sync with Nicereply.

Aircall: Log call details and listen to call recordings and voicemails in Front. Switch easily between calls and emails with everything saved in one place.

In Front, your critical information is always just a click away. With our open API, you can create an inbox that's tailored perfectly to your team's workflows. Build a custom Front plugin to show your customer database next to your messages, or integrate with any app your team relies on.



[See the full list of integrations you can connect with your inbox](#)



02

Customize your
inbox to
fit your team



Paint the full picture of every customer

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No two customer success teams work exactly the same way. Some have individual teammates working on multiple clients. Others have many teammates managing a single account. That's why we made Front customizable for teams. It supports customer success teams of many sizes, structures, and tiers. Instead of designing your workflows around the structure and limitations of your inbox, Front adapts to your ideal workflow.

Set up your ideal customer success workflows

There are a few common workflows customer success teams follow. In this chapter, we'll walk you through each one, plus how you can set it up in Front.

Tiered customer success: Customer success managers are not assigned to specific accounts. When customers send emails to `success@acmecorp.com`, the messages are distributed amongst the customer success team to respond.

Account-based customer success: Customer success managers are assigned to handle specific accounts individually or as a group. Customers email a dedicated address, like `shippinglogistics@acmecorp.com`, and the right person on the customer success team responds to the message.

One-to-one customer success: A single customer success manager is assigned to an account. Each customer directly messages their success manager's individual email address, like `susan@acmecorp.com`.

Combination customer success: Teams segment customers into groups and use a combination of the above workflows to serve their customers best.



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1. Tiered customer success

Teams who use a tiered customer success workflow have a central place for all customer messages to funnel into. This is often a general email alias, like `success@acmecorp.com`. Teams can work together to tackle customer problems quickly as they come in. Messages are often routed to the right person based on the message's sender, industry, or level of technicality

Challenges of using tiered customer success

- Everyone's inboxes are flooded, since you all get a copy of every email sent to `success@acmecorp.com`.
- It's hard to tell who's responded to what.
- Emails fall through the cracks, and customers feel ignored or get multiple replies.

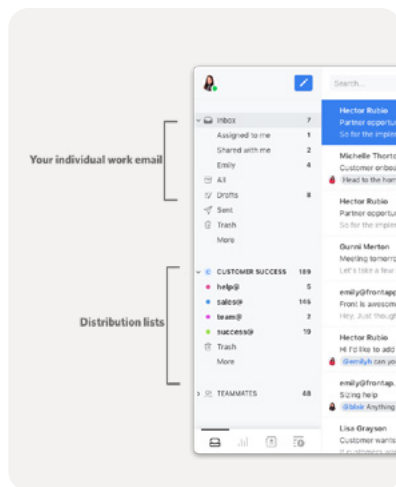
Tiered customer success in Front

With Front, you manage distribution lists in a shared inbox, so your whole team can access emails sent to `success@acmecorp.com`.

Higher team efficiency: Instead of everyone receiving a copy of every email in their own inbox, you're all looking at the same single copy in a shared inbox.

Faster response time: You can work faster because you all know what you're accountable for, and there are fewer emails clogging your inbox.

Increased customer satisfaction: No confusion, and no duplicate replies — when someone replies, everyone who has access to that shared inbox can see it.





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2. Account-based customer success

In Front, CSMs can manage dedicated customer addresses like `shippinglogistics@acmecorp.com` by creating a shared inbox for each customer's email address, then giving access to anyone who needs to see those messages.

Challenges of using account-based customer success

- Your team has to switch between multiple email accounts, which is messy and confusing.
- When multiple teammates work on one customer account, you might have to share passwords, and it's hard to tell who's accountable for what.
- Collaborating on an email means forwarding it, creating even more email.

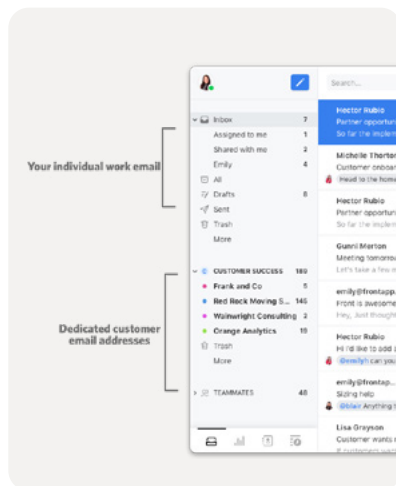
Account-based customer success in Front

In Front, CSMs can manage dedicated customer addresses like `shippinglogistics@acmecorp.com` by creating a shared inbox for each customer's email address. Then, you can grant access to that shared inbox for anyone who needs to see those messages.

Boosted efficiency: Teammates can access many accounts at once in Front, so there's no logging in and out or sharing passwords.

Increased accountability: You can see all the customer's email history in the shared inbox, so if you're new to the account or need to cover for someone, you can get up to speed quickly and have the context you need to reply.

More team visibility: If a teammate working on a shared inbox goes on vacation, you can easily give another teammate access in Front to cover it.





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3. One-to-one customer success

Another common workflow is one-to-one customer success. In this instance, customers simply send an email directly to a teammate's individual work email address, like susan@acmecorp.com. This workflow helps teammates build close customer relationships over time. The customer views their dedicated CSM as an extension of their own team.

Challenges of one-to-one customer success

- Collaborating is hard, with lots of forwarding, cc'ing, and confusing email threads.
- It's tough to get customer insights because messages are limited to one teammate's inbox.
- Customer experience is inconsistent when you take vacation or transfer accounts.

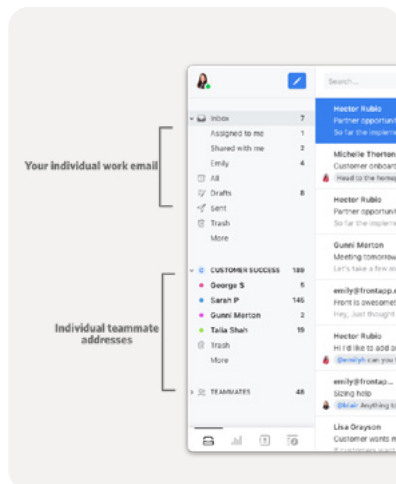
One-to-one customer success in Front

Front is built to manage team and individual email in one inbox. All you have to do is sync your individual work email account, and you're good to go.

Efficient collaboration: Easily leave comments on messages to chat with teammates, and share messages with a simple @mention instead of forwarding.

Faster resolution time: Work faster with productivity tools like reminders, rules, and assignments.

Consistency: Give a better experience with access to customer information in your inbox.





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4. Combination customer success

Some teams find that a combination of the models above are the best way to serve their customers. These teams will often segment customers by a common factor, like industry or business size. They'll manage customers who need more attention with a high-touch model like one-to-one customer success, and use a tiered customer success model or account-based customer success for more hands-off customers.

Challenges of teams using combination customer success

- Collaborating is hard, with lots of forwarding, cc'ing, and confusing email threads.
- It's hard to measure success with customers across the company, since you're messaging them at different rates, with different levels of involvement.
- Some customers fall through the cracks because it's hard to tell who's getting attention.

Combination customer success in Front

Setting up this workflow in Front is easy since you can design your inbox to your team's exact needs. You'll create team inboxes from any group email addresses, and then set up rules to easily route messages where they need to go.

Boosted team efficiency: You can set up your inboxes to get emails to the right person automatically, and it's easy to collaborate on emails without forwarding messages.

Increased accountability: Customer email history is visible to everyone in shared inboxes, so if you're new to the account or need to cover for someone, it's easy to get up to speed, and you have the context you need to reply.

Better insights: You can get insights on individual customers and customer segments since every customer message is in one place.



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Get every message into the right hands

You've chosen the workflows your team will use to manage customer messages. Now, you'll want to make sure every message is addressed by the right person as efficiently as possible. Front makes that easy with three features designed to help your team get every message organized and into the right hands, instantly: tags, rules, and assignments. We'll walk through each one below.

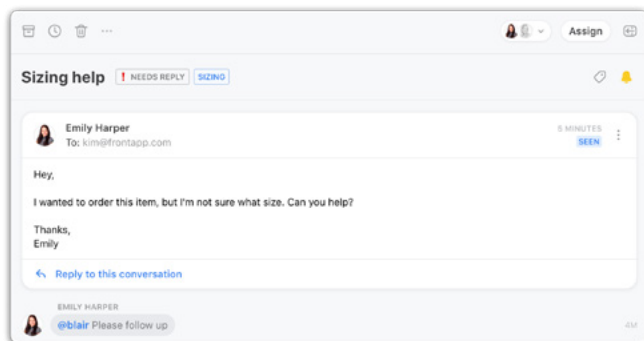
Using tags to organize your inbox

Tags help you organize your messages. You can make private tags that are visible only to you, or team tags that are visible to your whole team in a shared inbox. The great thing about a team tag is everyone's on the same page, and you all save time since you don't have to individually label messages. You're all helping each other out.

Popular ways customer success teams use tags

Message time: Automatically tag messages based on the time they were received, like "Today", "Yesterday" or "This week" so you know what needs to be worked on first.

Customer: Tag every customer by their name to keep all their messages, like emails, tweets, and live chats, in one place.



Business size: Organize messages by company size to route them to the right teammates, or get insights on your relationships with each segment.

Industry: Tag messages by industry to track what those customers love and pinpoint their unique challenges.

Health score: Easily spot happy customers and not-so-happy customers by tagging messages by their health score or CSAT.



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CUSTOMER SPOTLIGHT

Shopify Merchant Success Team

How Shopify replies in 24 hours or less, even when teammates take vacation

Challenge

[Shopify's](#) 50-person Merchant Success Team delivers a high-touch, white-glove experience to enterprise Shopify Plus customers. They process more than 200,000 inbound customer emails each month. They needed a way to stay accountable for customer messages when teammates were out of office.

Solution

Shopify uses one-to-one customer success: every client communicates with their dedicated Shopify teammate through their individual work email addresses. If someone takes vacation, they automatically route customer messages to shared inboxes, so another teammate can jump in, see the entire email thread for context, and reply.

Results

With Front, their team answers 23 percent of emails to their "vacation inboxes" in under an hour, and every message in 24 hours or less. Since they have more context and can collaborate internally, they're giving better replies. They built "replies on first resolve" into their customer success metrics, and it has increased by 10 percent each month since they started using Front.

"Front is amazing because everyone can look at a message when someone's on vacation, and have the context from the conversation thread to be able to answer,"

SAMAR MIRZA
Business Operations
Coordinator, Shopify



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Using rules to route messages automatically

In Front, rules make it easy to get every message exactly where it needs to be. Using if-then statements, rules let you automate certain tasks in Front. Your inbox will instantly know what to do with a message, based on the sender — or any kind of trigger, like a keyword or the time of day. Is it magic? Maybe.

A few rules customer success teams love to use in Front

Routing rules: Route every message to the right teammate based on a trigger, like the sender, the time of day, or a keyword or phrase in the message.

Example: For every message that's from a certain address, route it to the CSM who manages that account.

Rerouting rules: Reroute messages to another teammate when someone takes vacation.

Example: When a teammate is out of office, reroute messages from their inbox into a shared "Out of office" inbox, so the rest of the team can jump in and reply while they're out.

Auto-reply rules: Send personalized auto-replies to different customers or for specific situations.

Example: For customers with SLAs, set up a personalized auto-reply to let them know you're working on a resolution and will get back to them by the time agreed to.

Tagging rules: Automatically tag messages based on a trigger like a keyword, sender, or the time of day you received it.

Example: Tag all your messages by customer name so you can easily find every message from a given customer.



[Check out our Rules Directory for more popular examples of ways to use rules](#)



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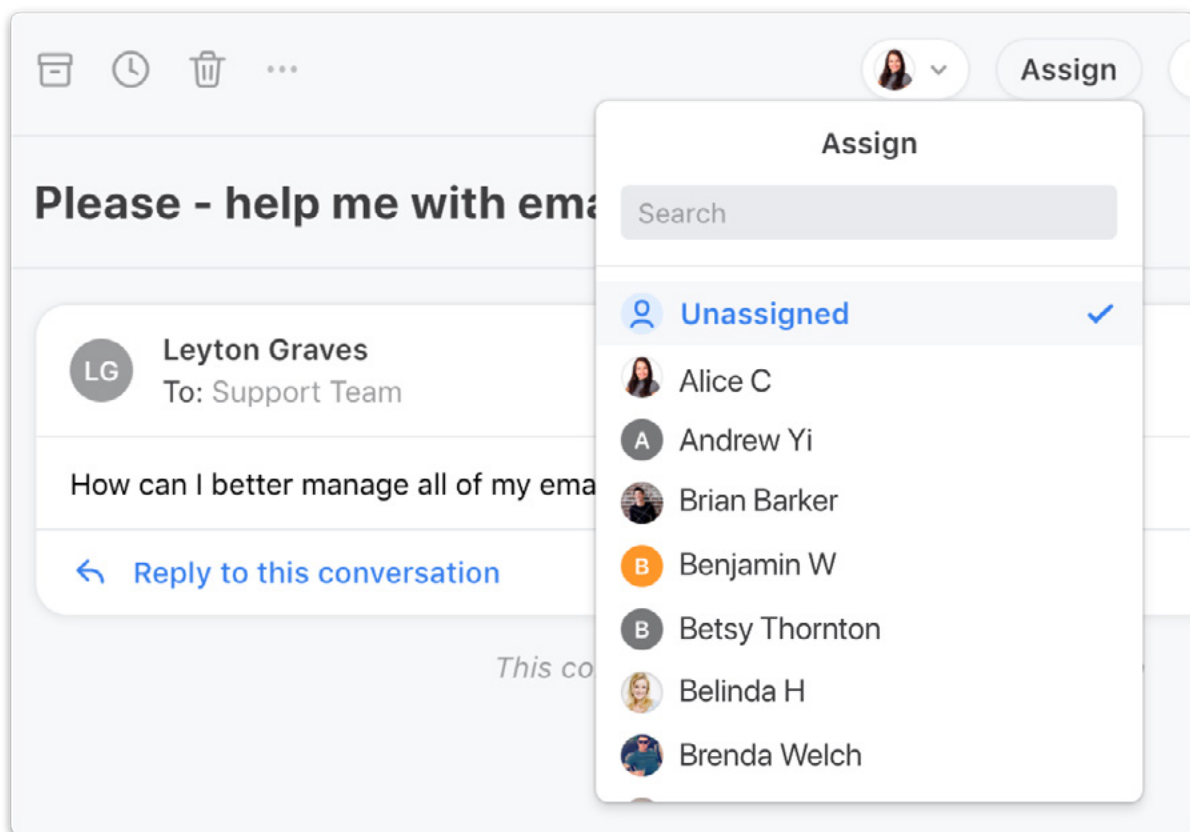
Give a consistent experience across the customer journey

Unlock insights to improve customer experience

Assigning messages to the right teammate

Ever been uncertain if you should reply to an email, or if your teammate's got it handled? Assignments in Front are like saying, "This is yours," or, "I've got this covered."

There's a clear owner for the message. When you assign a message to a teammate, it appears in their inbox. You can also assign a message to yourself, to let everyone else know you're on it.





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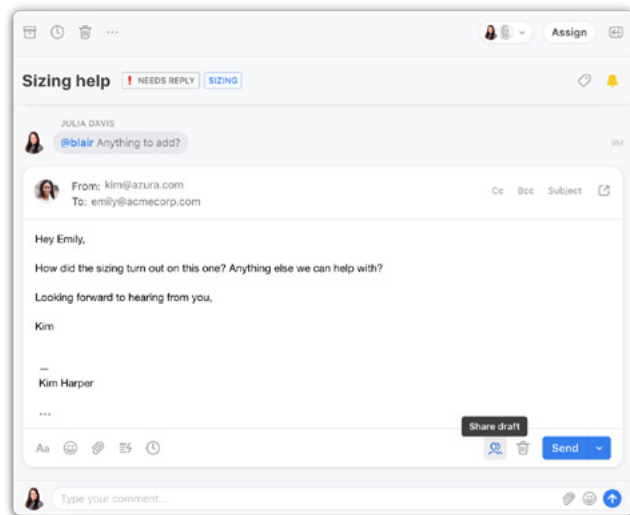
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Make collaboration easy

Customer success teams are naturally collaborative. You partner up within your team to find solutions. You work cross-functionally with other teams in your business, like sales, product, and support. But collaborating on email usually brings up two problems:

1. You forward an email to another teammate to explain the situation. This creates more email, is confusing, and takes longer to get a response back to your customer.
2. You discuss it in person or over Slack, but you can't track all the context with the original message. So no one understands where the solution came from when they look at your response later.

Since Front is designed for team collaboration, it has built-in tools to help you and your team work together, without clunky forwards or out-of-the-blue chat messages: shared drafts, and internal comments.



Work together in real time to write better replies

Sometimes you want another set of eyes on your message. Maybe you'll pass it to your teammate to grab their two cents? In Front, you can collaborate on messages in real time, as if they were Google Docs. All you have to do is start replying, then click "Share draft". Your team can now see the message and edit it with you. Sharing drafts eliminates a lot of internal chatter about replies.



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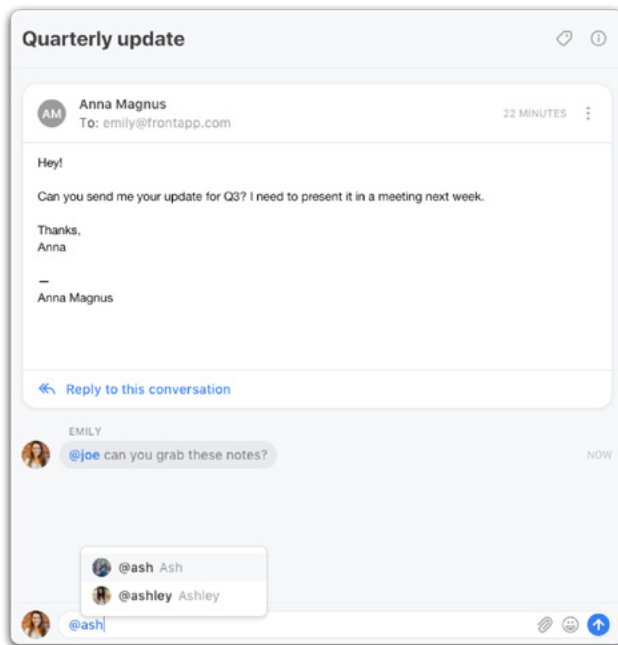
Unlock insights to improve customer experience

Chat with your team directly on messages

Instead of discussing a message on another chat tool like Slack, Google Hangouts, or Microsoft Teams, use internal comments and @mentions to chat it out directly on the email in Front. Comments live directly in your email threads, and they stay there. That way, when you or your teammates scroll back through a conversation, you can

fully understand the situation and why you replied that way.

A bonus? Don't worry about accidentally forwarding embarrassing internal chatter to your customer: comments are separate and not actually on the message itself. They're only visible to you and your team.



PRO TIPS

When internal comments are especially handy

Taking vacation: Leave comments on your emails before you leave for vacation. That way your teammates have context if they answer messages for you while you're away.

Handing over accounts: When you're passing a customer to a teammate, leave comments so they can jump right into the conversation smoothly.

Leaving yourself notes: Comments aren't just for your teammates! Use them to give yourself context, like, "We gave this customer a discount on 2/16/18." That way, you know what happened and why, even if you're looking at the message months later.



03

**Jumpstart your
team's productivity**



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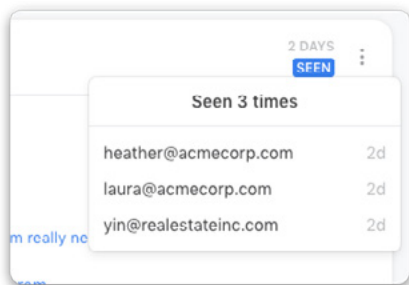
Employee productivity, happiness, and customer satisfaction are **directly linked**. It makes sense: When your team doesn't feel bogged down by complicated processes and unnecessary tasks, they're more likely to enjoy coming to work each day. And when they feel good about their job, that positivity reflects in their relationships with customers.

Front has built-in productivity tools to empower your team do their best. That way, individual customer success managers work happier, and they have more time to focus on what matters: your customers.

Work efficiently to focus more on your customers

Customer success managers have a lot on their plates each day — urgent messages to answer, customers to engage, and new challenges to work through. Every little part of their workflow that can be smoothed out and sped up goes a long way in helping them get work done and focus on their customers.

How customer success managers are more productive with Front



Read receipts: Did they get my email? You can finally stop worrying about being ignored when you don't hear back in a few days. Front has read receipts so you can see if a customer has viewed your message, how many times they've viewed it, plus the exact date and time. That way you know when it's an acceptable time to follow up.

Reminders: Never forget to follow up again. When you send a message to a customer, set a reminder to specify a date and time for the message to pop back up in your inbox if you don't receive a reply. That way, you'll never drop the ball on an email, and you don't have to rely on your memory or a post-it to follow up a week later.



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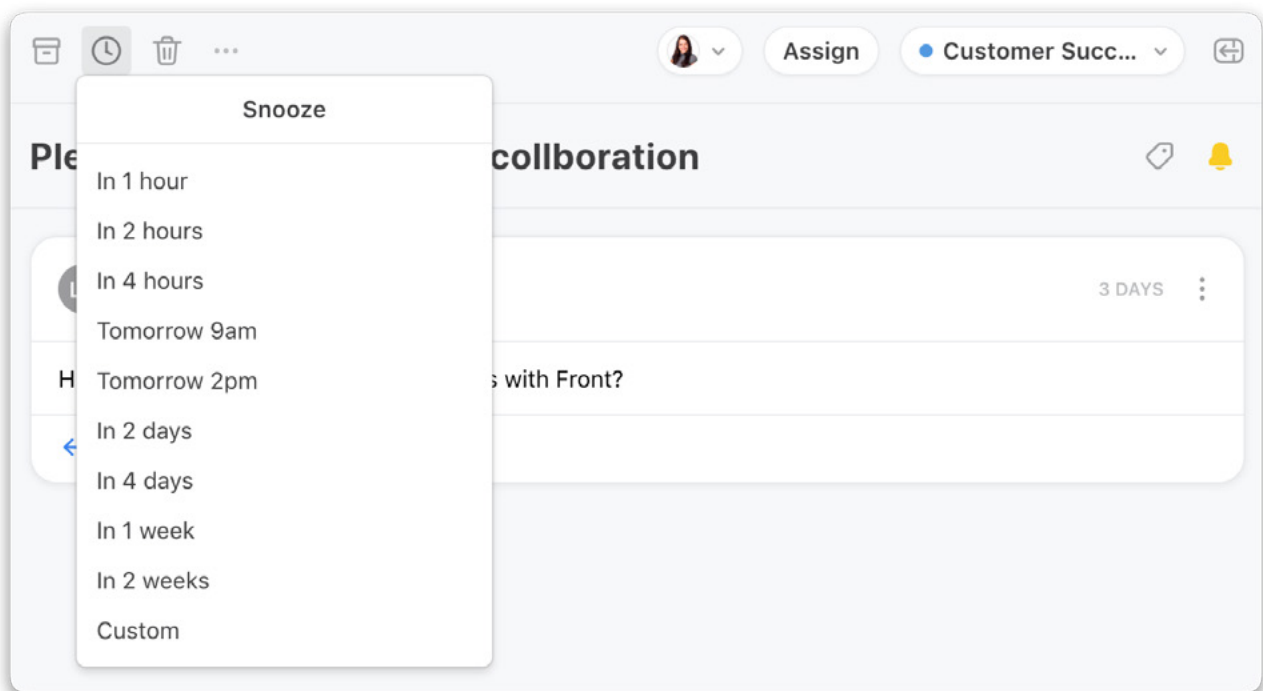
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Snooze: Don't need to look at a message right this second? Hit snooze when it can wait until Friday, or if you want to read it at 3pm after your customer call, for instance. Snoozing a message takes it out of your inbox so it doesn't distract you, and brings it back to your inbox at the time you choose.

Rules: Ever wish your inbox had a brain? Rules are pretty close. You can use rules to make your inbox do some tasks for you, like send auto-replies tailored to specific customers, or tag messages. Set an auto-reply for customers to let them know you'll respond shortly.





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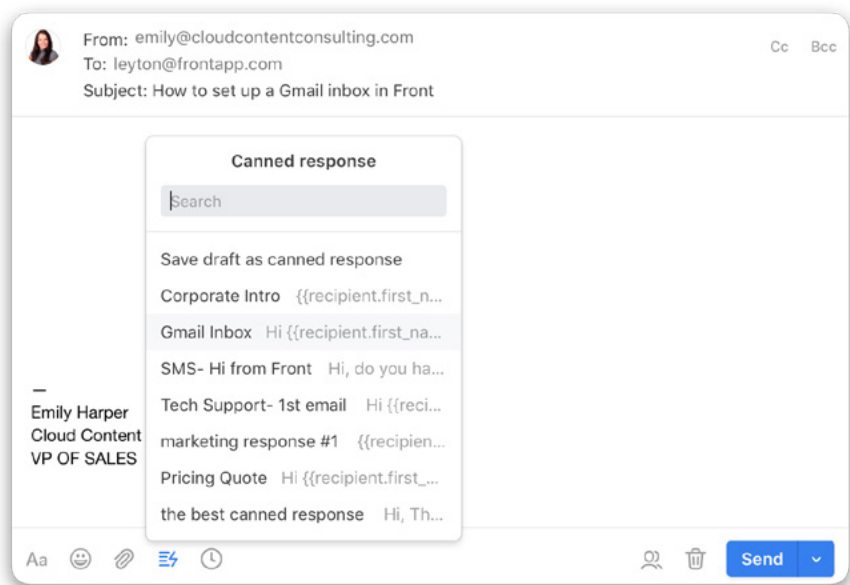
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Canned responses: Sending the same messages over and over? Canned responses can be a real game-changer for introduction emails, messages with links to resources, or customer issues you find yourself explaining all the time. Instead of attaching documents, formatting messages, and writing the same thing again and again, just type it once, save it, and select it when you need it.



PRO TIPS

Great ways to use canned responses

Onboarding new teammates: When you're onboarding new customer success managers to your team, give them an idea of how they should be reaching out and responding to customers.

Answering tough questions: When you're faced with a tricky circumstance and aren't sure how to respond, tap into your teammates' genius wording.

Staying on brand: When you're communicating about a specific feature, event, or announcement, keep wording in your team's emails consistent with your company's messaging.



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CUSTOMER SPOTLIGHT

Cisco Meraki Sales Support Team

How Cisco Meraki responds to critical emails in 15 minutes or less

Challenge

Cisco Meraki's Sales Support team of 16 operates as an internal customer success arm, working quickly to find resolutions for their 600 sales reps across the globe. They received hundreds of inbound requests each day to their Outlook distribution list, but reply-alls were clogging their inboxes and slowing them down. It was hard to tell who was answering what.

Solution

They use Front's productivity and automation tools to stay organized and work through messages faster. They set up rules in Front to automatically tag messages based on keywords. Canned responses help them communicate common solutions with a click, and they have rules that automatically tag urgent messages, so they know what needs a reply.

Results

The team handles 10,000 monthly messages and answers every message in 15 minutes or less. Since they have a rule in Front to automatically flag unreplied messages after a certain time period, the team knows what needs a response urgently.

"Front is amazing because everyone can look at a message when someone's on vacation, and have the context from the conversation thread to be able to answer,"

SAMAR MIRZA
Business Operations
Coordinator, Shopify



Paint the full picture of every customer

Customize your inbox to fit your team

Jumpstart your team's productivity

Give a consistent experience across the customer journey

Unlock insights to improve customer experience

Customer success email templates

A well-written email can do wonders for building a strong relationship with a customer. We collected some great copy to give you a little inspiration when you're writing to customers. Use these examples to start, and tweak them to fit your unique voice and circumstances.

Handing off a new customer from the Sales to Customer Success team:

Hi **{{customer first name}}**,

Congratulations and thank you for choosing **{{your company name}}**! While I've been your go-to person during your trial period, I want to formally introduce you to your official customer success manager, **{{CSM name}}**.

{{CSM name}}'s customers love working with **{him/her}** and **{he/she}** has extensive knowledge of our entire product. You'll be in great hands.

{{CSM name}} will be reaching out to you about next steps, but I just wanted to say another thanks for working with me and being our customer.



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Scheduling a Business Review:

Hi **{{first name}}**,

As the end of the year approaches, we're beginning to plan for an exciting new year at **{{your company name}}**! To kick things off, we'd like to schedule a review of your past year. During this conversation, we'd love to get your feedback on how things are going on your end and have you share improvements you'd like us to make in the coming year.

Your feedback is going to be incredibly important as we plan for next year. What day and time would work best for a call next week?

Reaching out to an unresponsive customer:

Hi **{{first name}}**,

It's been a while since we chatted! I'd love to hear how things are going on your end and see how I can help make your experience better. Are you open to sharing some insights with me over email, or scheduling a call so I can share some of the things we've been working on for you at **{{product}}**?



[Download this email copy as inspiration,](#)
[or add them as canned responses in Front](#)





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Engage your customers with personalized campaigns

No matter how many customer accounts you're managing, automating some emails can help free up your time. That way you have the bandwidth to pay more attention to every customer. With Front, you can do this directly in your inbox with **sequences**.

Sequences are automated email campaigns you can send to a list of customers. Usually, all the emails in a sequence revolve around a single topic, like onboarding tips for training new customers, or resources for engaging existing customers, for example.

You can set specific timing for each email in a sequence. Every customer receives the next email at the right time, no matter when they start the sequence. When a customer replies, they'll instantly exit the sequence, so you can take up the conversation from there.



PRO TIPS

Personalize email sequences with dynamic variables

"Dear valued customer" sounds...well, a bit stuffy and impersonal. Dodge the "vague corporate robot" vibe with dynamic variables in Front. They let you add a hint of personalization and detail to automated messages, so your nice human voice can shine through. Just type {{ to automatically populate customer data points, like their name, contact information, Twitter handle, and more.



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ADVICE FROM THE EXPERTS

Balance automation and personalization

Sending an automated email campaign is just one strategy for managing high-touch customer relationships at scale. Since it's a different challenge for every team, we asked customer success gurus from ShareThis and Open Listings to share their strategies for using automation, while keeping customer experience personal.

Supplement automated campaigns with unique content



"Our main goal for customer happiness is making sure that we're engaged with our users whenever they reach out for support, and to provide up-to-date content that helps answer common questions. We've set up a variety of triggers that allow us to send crafted personal messages to our users as they wait to receive help. Within these emails are alternative ways they can find additional support through articles we've created beforehand."

BRANDON SUN: Chief Happiness Officer, ShareThis

Surprise and delight customers by keeping responses real



"At Open Listings, we have a surprise and delight mentality when it comes to customer happiness. In fact, we recently extended our CS hours to 10PM PST so that we could differentiate ourselves by getting you answers to your home buying questions, even when you might expect no one to be online. We use Front to manage all our customer-facing communications. Front lets us deliver a consistent experience, no matter where you are, or who you are. No email is sent greeting you with, 'Hi there.' We are hypersensitive about making our customers understand that we have real people on the other end of our conversations, people who care and want to help them buy their home."

KEVIN MILLER: Director of Growth, Open Listings



04

**Give a consistent
experience across
the customer
journey**



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From marketing, to sales, support, and more, your entire company plays a part in shaping the customer journey. That's why it's crucial to have access to all your customers' communication with your business, not just their messages directly with your customer success team. Since Front brings every message with your customers into one place, you can actually see every touchpoint each customer has with your team.

Bridge the gap between Sales and Customer Success

Transitioning customers from Sales to Customer Success is a notoriously delicate process. A poor transition typically leads to two problems:

- Customers feel unappreciated because their information falls through the cracks and they have to repeat themselves to your team.
- Teams point fingers at each other when a customer is unhappy because no one knows who's accountable for what.

In either case, you're stuck with unsatisfied customers and teams that grow increasingly distant. That's why we built Front to open up communication between individual teammates and cross-functional teams. With Front, handing off customers is a breeze.

Ways Sales and Customer Success teams love to work together in Front

Route messages from Sales to Customer Success automatically:

Make rules to automatically route messages to the right customer success manager when a sale has closed.

Get context from the sales process: Share email threads about the entire sales process, from prospecting to deal signing, in order to strategize on how you'll engage or onboard customers. No forwarding needed — just @mention your teammate on the email threads.

Collaborate to write better replies: Help each other give better responses with Front's shared drafts feature, which lets you work on drafts of messages together in real time. No more copying-and-pasting potential drafts.



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ADVICE FROM THE EXPERTS

Perfecting the Sales to Customer Success handoff

We asked four customer relationship gurus who have perfected the Sales to Customer Success knowledge transfer to share their tips for a smooth handoff.



01

"Set relationship management expectations during the sales process."

JEREMY DONOVAN: Head of Sales Strategy & Enablement, CB Insights

"Your efforts towards a successful handoff begin in the sales process — right when the relationship with your customer begins. Make sure your sales team lets your customers know what your post-sales relationship will look like before they sign the deal. Will they receive a designated account manager or customer success manager? Will they have a customer success team to contact for questions? Will they contact your general support line if they need help? With these expectations clearly outlined, there are no surprises later on down the line."



02

"Sales and customer success need to have an open dialogue."

- CHAD HORENFELDT: VP of Customer Success, Updater

"If you're going to master the handoff, your teams should get accustomed to sharing their mistakes. If there was a hiccup during the sales demo, or an onboarding presentation that didn't go so well, teams should swap those stories, not hide them. Doing so will build trust, bring you closer together, and open up the floor for teammates to help each other handle every situation better. By dedicating a time to discuss the relationship between sales and customer success, team leaders can instill a focus on empathy between teams from the top down."



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03

"Approach challenges with a collaborative attitude, and share that with your customers."

ADDY CLARK: Director of Customer Engagement and Advocacy, FinancialForce

"Sharing your mistakes openly with customers and making them aware of how your internal teams are working together to approach resolutions helps set the stage for strong customer relationships. When something goes awry, be open about it, rather than seeking liability within internal teams, or pushing blame off onto another team as an explanation to your customers. Remember, when you're talking to customers, showing them you're human is the best thing you can do to build trust."



04

"The initial conversation between sales and customer success teams might look like a game of 20 questions."

BROOKE GOODBARY: Customer Success Consultant, www.brooke.land

"The bits of information your customers share during the sales process or teams are, relying on an ad-hoc transfer of information, i.e. a brief chat or a few forwarded emails, won't cut it."



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Checklist: The Sales to Customer Success handoff

How can you guarantee a smooth handoff for every customer? Build a list of questions you know you want to capture during the sales process. Here's a basic list to start with below — then add anything you need to fit your team's specific needs.

Basic customer information

- What's the company size?
- What industry do they operate in?
- How do they make money?
- What's their use case?
- What pricing plan are they on?
- Which team(s) are using it?
- How many people are using it to start?
- What was the customer's general sentiment during the exploration and buying process?

Contract

- Are there unique terms for this agreement, or a custom SLA?
- Who is the champion for your product or service?
- Who was the final decision maker for the purchase?
- Who else did you work with to make the agreement?
- Who will be the point of contact going forward?

Deployment

- What team will be using this? What's the makeup of that team?
- What's the expected timeline for deploying?
- If you offer a trial period, did they use it? What questions did they have during the trial period? What components were stickiest during trial?
- How much do the end users know about the product?



[Download the full checklist for questions on customer goals, expectations, deployment, and more](#)





05

**Unlock customer
insights to
improve customer
experience**



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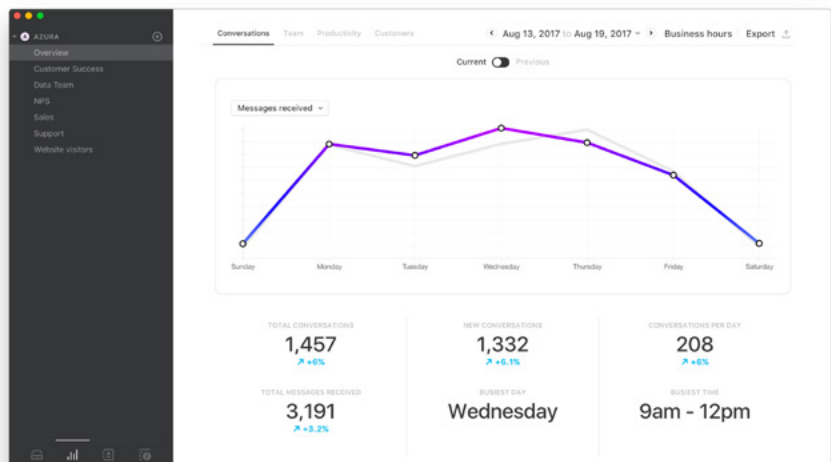
Give a consistent experience across the customer journey

Unlock insights to improve customer experience

Customer success managers track all sorts of metrics around customers — their satisfaction scores, engagements, lifecycle touchpoints...the list goes on. But what about email interactions with customers? There's a good chance you have very little insight into your team's emailing habits. That's because traditional email clients like Gmail and Microsoft Outlook don't offer any analytics or reporting.

Front's **analytics** give you powerful insights on how your team works and what your customers need. That way, you can take actions that enable your team and customers to succeed. Front's analytics give you insight into four key areas for customer success:

- **Conversations:** Track messages sent and received across all inboxes and communication channels
- **Team:** Learn about messaging habits and performance for individual teammates
- **Productivity:** Monitor your team's efficiency and gain insights on team workflows
- **Customers:** Gather statistics on your communications with individual customers, and watch trends across industry, business size, and more



Track team and individual performance, conversation habits, and customer trends with Front's analytics.



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Use data to make your customers happier

Front's analytics are useful for your customer success team, and for teams across your company — like product, marketing, and sales. When you know more about what your customers want and need, you can adjust your workflows, improve your product, and ultimately give a better experience.

Popular customer success metrics to gather in Front Analytics

- **Response time:** By seeing how long your customers are waiting for a response, you can find ways to get back to them sooner. Maybe you want to add more teammates, change your team structure, or improve your workflow to be even more efficient.
- **Replies to resolve:** Look at how many messages it takes for you to solve a customer's problem. The less back and forth, the happier your customers will be!
- **Messages received:** Monitor incoming messages for each teammate, so you can distribute the workload evenly among your team.
- **Average first response:** See how quickly you're getting back to certain customers to ensure you exceed expectations and meet SLAs.
- **Conversations by tag:** Get insights on trends by individual customer, industry, or any of the tags you've created, so you can learn how to serve your customers better.



[Explore all the insights you can gather in Front Analytics](#)



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CUSTOMER SPOTLIGHT

HubSpot Customer Success Team

How HubSpot tracks message data to give a better experience

Challenge

HubSpot's Customer Success Team received a high volume of messages about implementing and using their B2B growth marketing platform. Each customer success manager cultivates an area of expertise, rather than a book of accounts. They used Google Groups to manage customer conversations, but they lacked accountability over messages from their more than 4,000 customers. Collaborating on messages was tough, and customer experience suffered.

Solution

They manage their customer messages in Front with their team's shared responsibility model. With 33 automated keyword rules, they automatically tag and route messages to the right person. They use Front's analytics, and they integrate their Front inboxes with Nicereply to measure response time, CSAT, and other success metrics.

Results

Since they started using Front, HubSpot responds to every customer message in 2 hours or less. They've measured consistently higher customer success scores. Teammates have more autonomy and work more efficiently because there's no confusion on who should answer what. As a team, they have more visibility into customer messages, so they are more transparent and can support each other better. Now they have more time for special projects and processes that create long-term value.

"Front is amazing because everyone can look at a message when someone's on vacation, and have the context from the conversation thread to be able to answer,"

LOCK WHITNEY
Manager of Customer
Success, HubSpot



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Checklist: Key customer success metrics

Tracking how your team talks to customers can help you find ways to communicate better over time. Below are some popular metrics for customer success teams. Since every team is different, your team might fall into just one category, or you might look at metrics from all three. Choose the ones that work best for your team.

Goal: Service

For customer success teams that are service-oriented, who aim to give a high-touch, white-glove experience

- ☐ Response time - How long before you reply?
- ☐ Replies to resolve - How many responses does it take to reach a resolution?
- ☐ Volume - How many emails are your team or individuals receiving?
- ☐ CSAT - Customer Satisfaction Score
- ☐ NPS - Net Promoter Score

Goal: Growth

For customer success teams that are sales-oriented, who aim to identify and drive new sales opportunities

- ☐ Revenue growth - How much revenue is attributed to the team or individual?
- ☐ Renewal and churn percentage - How many customers are renewing and churning by team or individual?
- ☐ Growth opportunities identified - How many opportunities did the CSM identify and pass along to Sales?

Goal: Success

For customer success teams that are retention-focused, who aim to engage customers and promote their happiness

- ☐ Health scores - How happy is each customer?
- ☐ Engagement and adoption rates - How many new customers actively use your product or service?
- ☐ Deployment rate - How many opportunities within a customer's business are deployed to, or identified to deploy to?
- ☐ Retention - How many customers remain customers?



[Download this checklist for your team](#)





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Promoting the customer across other teams in your business

Any team in your business can benefit from getting closer to your customers. Giving them access to your customer messages is an easy way to do that. All types of teams, not just Customer Success, can use Front to manage their team or individual messages. You can also give other teams access to your shared inboxes in Front to spread customer insights throughout your business.

Common teams who also use Front along with Customer Success

Support teams: Assign a message in Front to your support team so they can dig into details on a specific customer issue.

Product teams: Use tags to track feature requests and common bugs. Then use customer feedback to prioritize your product roadmap.

Marketing teams: Get a closer look into the way customers think by reading their messages in shared inboxes. Adjust and improve your messaging by seeing the language your customers use.

Executive teams: Browse shared inboxes to get insight into team performance. Stay close to customer needs by looking through their feedback.



[Learn about how other teams in your business can manage their messages in Front](#)



CONCLUSION

Your customers deserve the best. And so does your team.

Email wasn't built for managing customer relationships. It makes collaborating complicated, so it's hard for teams to work together. It's not flexible, so it doesn't accommodate customer success workflows. And it's disconnected from our other apps, so our critical customer information is siloed, separate from the place we're actually communicating with customers.

The bottom line is: Email doesn't empower your team to do their best work.

Front empowers your team with the tools and insights they need — so your customers can get the excellent experience they expect. With all your customer messages and information in one easy-to-use inbox, it's easy for your team to understand what customers want. With productivity tools that enable your team to work through every message more efficiently, your team can spend more time building quality customer relationships.



ABOUT FRONT

Front redefines work communication with the first shared inbox for teams. By unifying your email, customer communication channels, and apps in one platform, Front helps teams collaborate efficiently and have more context and visibility into every conversation, to work faster and better together. Today, more than 3,500 businesses rely on Front to power their work communications. Founded in 2013 by Mathilde Collin and Laurent Perrin, Front has raised \$79 million in venture funding and has 50+ employees in its San Francisco headquarters and Paris, France office.

