

# LEANDATA FOR POST-SALES

Give your customers a post-purchase experience they will love



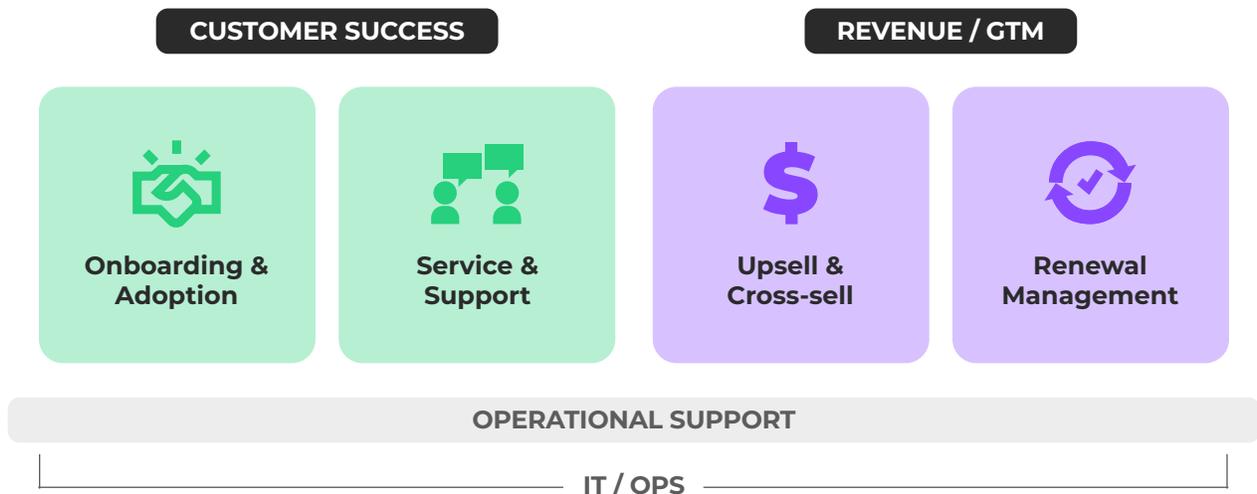
## The Challenge

Gaining a new customer is just the first step. Keeping that customer for the long haul requires delivering exceptional customer experiences. In fact, according to Forbes, there is an 80% increase in revenue for businesses that focus on improving the customer experience.

Exceptional customer experiences rely on smooth and seamless operations. But challenges such as delayed support, inefficient onboarding, poor internal coordination, and mismatched and unaligned customer data can get in the way of delivering the right customer experience. How you overcome these challenges sets you apart from your competition.

## The Solution

LeanData does the heavy lifting for you, dramatically reducing manual efforts by automating processes your marketing, sales and customer teams rely on. With LeanData's Intelligent GTM Orchestration Platform, you can easily take action on any data in the CRM including renewals, product usage, and licensing details. Whether you're assigning and scheduling onboarding tasks, routing help tickets to the right support expert, or alerting the team to upcoming renewal windows – LeanData ensures that post-sales activities are efficient, accurate, and personalized.



## Seamless Customer Onboarding

Onboarding and training a wide base of new customers smoothly can strain internal resources and processes. LeanData streamlines and supports the entire process ensuring customers are guided efficiently through each step leading to internal efficiency gains.

- Route and manage onboarding tasks ensuring new customers are set up and trained effectively.
- Automate handoffs and customer account ownership changes between internal teams without disruption to the customer.
- Assign and track onboarding tasks and SLAs so that customers receive necessary guidance and support throughout the onboarding process.

## Responsive Customer Support

Today's customers expect immediate resolution. Delays and inaccurate answers lead to frustration and diminished trust. Whether you use a tiered or swarmed support model, LeanData accelerates customer issue resolution.

- Create and manage case routing logic that assigns and escalates cases to the appropriate tier or specialist.
- Efficiently handle support issues with routing, scheduling, and notifications to ensure quick resolution and enhance customer satisfaction (CSAT).
- Automatically match support cases to accounts to provide full context, send notifications, and monitor SLA compliance.

## Timely Cross-sell & Upsell Triggers

Customers rarely want to buy more products on your timeline. LeanData helps you promote purchase offers precisely when customers are most receptive, driving additional revenue from the existing customer base and improving the ROI of customer experience programs.

- Automate the identification and management of cross-sell and upsell opportunities.
- Capture and react to customer buying signals present within your CRM's data.
- Proactively engage customers with relevant offers at the right time, based on triggers and buying signals.

## Early Renewal & Churn Risk Identification

Most customers don't keep track of renewal dates, but they do remember how satisfied they are with your company. Getting ahead of potential cancellations and renewal opportunities can significantly impact revenues. LeanData enables timely engagement with customers and provides complete context for personalized interactions, helping to strengthen communication and build trust with customers.

- Proactively manage customer renewals by monitoring days from renewal, account health, usage patterns, engagement levels, and buyer intent signals.
- Identify at-risk customers, send automated alerts, and address their needs before renewal periods.
- Automate and streamline account renewal activities, including timely renewal reminders, important customer signals, and internal account-related tasks.

## Efficient Post-Sales Operations

Exceptional customer experiences depend on efficient, streamlined operations. However, disconnected systems and manual processes create friction, leading to customer issues being overlooked. LeanData simplifies post-sales operations by orchestrating data and processes across your entire GTM strategy.

LeanData's Intelligent GTM Orchestration Platform connects data within Salesforce, synchronizes it across platforms, automates tasks and notifications, and enforces SLAs to improve efficiency and elevate customer experiences. Additionally, AI-powered capabilities like AI Graph Summary and AI Graph Comparison provide a clear, visual view of your workflows, allowing you to analyze, compare, and identify bottlenecks before they affect your customers. The result? Fewer manual tasks, a more efficient and scalable GTM engine, and fewer customers slipping through the cracks.

- Automate the management of closed-won opportunities and assignments to the appropriate deal desk, legal, finance, and other teams based on user-defined criteria.
- Streamline the internal processes necessary for finalizing transactions and initiating service delivery, including distributing new customer accounts across customer managers or solution consultants for management.
- Improve the accuracy and effectiveness of assignments by automatically processing and routing based on custom criteria and related data.

"The addition of LeanData has streamlined our operations significantly, ensuring that accounts are assigned to the right reps based on very specific criteria, at the right time. This has helped drive better outcomes at scale, especially for a Success and Implementation team like ours that serves a global market. We benefited greatly in terms of speed, efficiency, and flexibility."

**Aaron Dungca**

VP of Merchant Success | Rebuy Engine

# GET STARTED TODAY

Visit [LeanData.com](https://LeanData.com) to learn more about LeanData's go-to-market operations solutions for Matching, Routing, Scheduling and Buying Groups, or visit us on [AppExchange](https://AppExchange.com).

REQUEST A DEMO

## Why LeanData?

LeanData helps B2B enterprises fuel efficient growth by aligning marketing, sales, and customer service execution with the buyer journey. Our Intelligent GTM Orchestration platform acts as the connective tissue across the revenue lifecycle, integrating and normalizing buyer data, automating signal-driven workflows, and delivering AI-powered insights. The result is faster, cleaner execution and the ability to adapt GTM motions with agility without coding. More than 1,000 leading companies and a community of 5,000+ OpsStars rely on LeanData to achieve speed to lead, higher conversions, accelerated pipeline, and predictable growth by turning buyer signals into coordinated action.