LeanData

ORCHESTRATING THE CUSTOMER JOURNEY AFTER THE SALE

HOW MODERN OPS TEAMS POWER RETENTION, RENEWALS, AND SUPPORT

WINNING A CUSTOMER IS ONLY THE BEGINNING

KEEPING THEM IS WHERE THE REAL CHALLENGE — AND OPPORTUNITY BEGINS

Keeping customers happy used to be simple: answer questions, resolve tickets, and renew contracts. But today's post-sales reality is far messier. Global teams follow different processes. Case routing rules live in a tangle of Apex, spreadsheets, and Slack threads. Ownership changes break automations.

And one missed signal, like a stalled onboarding task, an unanswered case, a renewal slipping quiet, can ripple into churn.

What makes it harder: none of these issues feel big on their own. It's the accumulation of tiny operational failures that erode trust. So whether it's a five-minute routing delay, a rep taking a case mid-workflow, or a handoff that never actually hands off, customers feel the cracks long before teams see them.

Today's post-sales work demands something different: clear signals, clean processes, and workflows resilient enough to evolve as teams, products, and expectations shift.

This guide showcases how **forward-thinking ops teams are solving the most persistent post-sales challenges.**
You will learn:

- The operational pitfalls that quietly break onboarding, support, renewals, and expansion
- What intelligent, signal-driven post-sales orchestration actually looks like in practice
- How real companies streamline routing, protect SLAs, support global teams, and adapt without rewriting their CRM

Yes, customer experience is about service, but it's also about the systems behind it, and whether they work when it matters.

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EXECUTIVE SUMMARY

Today's customer experience is shaped less by big moments and more by the hundreds of small operational decisions that happen after the sale. When onboarding stalls, cases bounce around, or renewal signals go unnoticed, trust erodes fast.

Most teams aren't struggling because they lack effort. They struggle because post sales operations relies on scattered rules, manual fixes, and systems that hesitate when customers expect speed.

This ebook reveals what efficient post sales operations looks like. It outlines the hidden friction inside onboarding, support, renewal, and expansion, and shows how delays, routing gaps, and fragmented handoffs quietly weaken customer relationships.

It also breaks down why global teams need workflows that respect business hours, workloads, skills, and time zones without forcing Ops to rebuild the CRM every quarter.

WHAT MODERN ORCHESTRATION MAKES POSSIBLE

You will find a practical view of intelligent orchestration, including how connected data, real time routing, SLA timers, and AI visibility tools turn customer signals into predictable next steps.

The guide also highlights how companies use LeanData to streamline onboarding, accelerate ticket handling, manage renewals, and uncover expansion opportunities, all without relying on Apex or fragile workarounds.

The takeaway is simple:

Strong post sales operations are built on structure, speed, and clarity. When teams get this right, customers stay longer, expand faster, and experience a smoother journey at every stage.

PART 01

THE OPERATIONAL REALITIES UNDERMINING YOUR CUSTOMER EXPERIENCE

THE HIDDEN FRICTION INSIDE POST SALES OPERATIONS

Post sales operations rarely fall apart in one dramatic moment. They erode slowly, through small cracks that widen over time.

Whether it's a case sitting in the wrong queue, a rule firing out of order, or a rep grabbing a record to help, only to break the process without realizing it. These issues feel minor in isolation, but together they form a system that runs on guesswork rather than structure.

THE SAME PATTERNS APPEAR ACROSS MOST OPERATIONS TEAMS

- Manual triage that depends on judgment instead of process
- Routing rules scattered across Apex, workflows, and older tools
- Automations that collide or override one another
- Assignments made without regard for working hours or time zones
- Escalations handled through chat threads and side channels
- Visibility gaps that hide account health and workload patterns

Global operations add even more friction. Sometimes schedules are inconsistent or PTO is not captured in a system that routing engines can read. Cases land with people who are not online and work piles up unevenly across regions.

These issues have clear consequences: missed targets, confusing reassignments, and unreliable reporting.

But the real cost shows up in the customer experience.

Ultimately, it reflects the strength of the internal system behind it, but many of those systems struggle long before symptoms become visible.

23.5%

of loyal customers are driven away by sub-par customer service.

– Yotpo

59%

of customers reported once they are loyal to a brand, the brand has their loyalty for life.

– Acquia

50%

of consumers would switch to a competitor after one bad customer experience.

– Zendesk

ORCHESTRATION

is the practice of connecting signals, tasks, and teams into one clear process.

In post sales work, orchestration means turning every customer signal into a predictable next step. It connects teams, workflows, and systems so onboarding, support, and renewals move smoothly instead of relying on manual effort.

PART 02

WHAT INTELLIGENT POST-SALES ORCHESTRATION LOOKS LIKE

CORE ELEMENTS OF INTELLIGENT POST SALES ORCHESTRATION

Post sales teams work best when systems do the heavy lifting. Good orchestration brings together signals, processes, and people so every customer gets a consistent and timely experience.

A CLEAR AND CONNECTED DATA FOUNDATION

Modern orchestration begins with clean and connected data. Customer signals live in many places, including the CRM, support tools, usage systems, and intent sources. When these signals stay separate, teams cannot see the full picture. A unified data layer gives every workflow the context it needs, from onboarding tasks to high priority support cases.

AI VISIBILITY TOOLS THAT SURFACE RISK EARLY

AI visibility tools scan patterns in cases, tasks, timing, and customer activity to reveal issues that would be hard to detect by hand. AI visibility tools can reveal:

- **Renewals at risk**, based on slow onboarding, rising case volume, or reduced engagement
- **Routing bottlenecks**, where cases wait too long or move through steps in the wrong order
- **Uneven workloads**, when certain reps or regions carry a heavier share of volume or complexity
- **Capacity issues**, when the current team structure cannot keep up with demand
- **Slipping SLAs**, by pinpointing the exact stages where response time falls behind

WORKFLOWS THAT RUN WITHOUT WAITING

The next layer is workflow automation. This is where the system triggers the right steps without waiting for someone to intervene. Strong post sales workflows include:

- Case assignment that respects schedules and time zones
- Escalation rules for complex or urgent issues
- Onboarding tasks that start on time
- Renewal workflows based on contract dates
- SLA timers that hold teams to standards
- Notifications through Slack or Teams when action is required

AGILITY WITHOUT THE REBUILDS

Finally, orchestration must adapt. A no-code environment lets teams adjust logic without touching Apex or rebuilding processes. This gives Ops, CS, and IT the freedom to scale into new products, regions, or team structures while keeping the system stable.

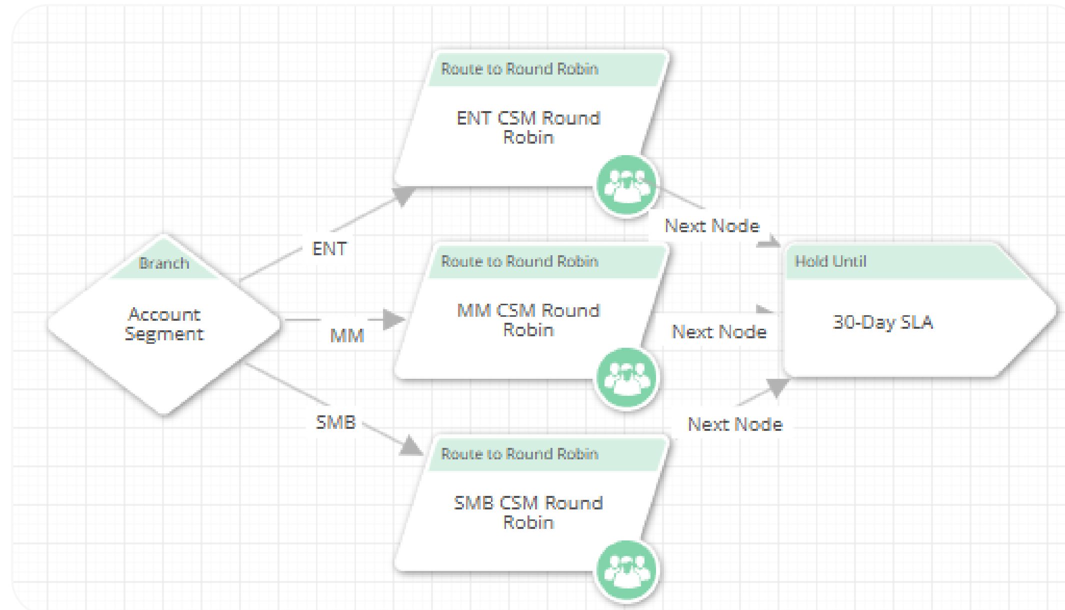
Intelligent orchestration creates order where teams once relied on manual effort. It turns signals into predictable workflows that support every stage of the customer journey.

PART 03

LEANDATA USE CASES FOR POST-SALES

ONBOARDING

Assign, route, schedule, and manage onboarding tasks to ensure new customers are set up and trained.



HOW WE SUPPORT

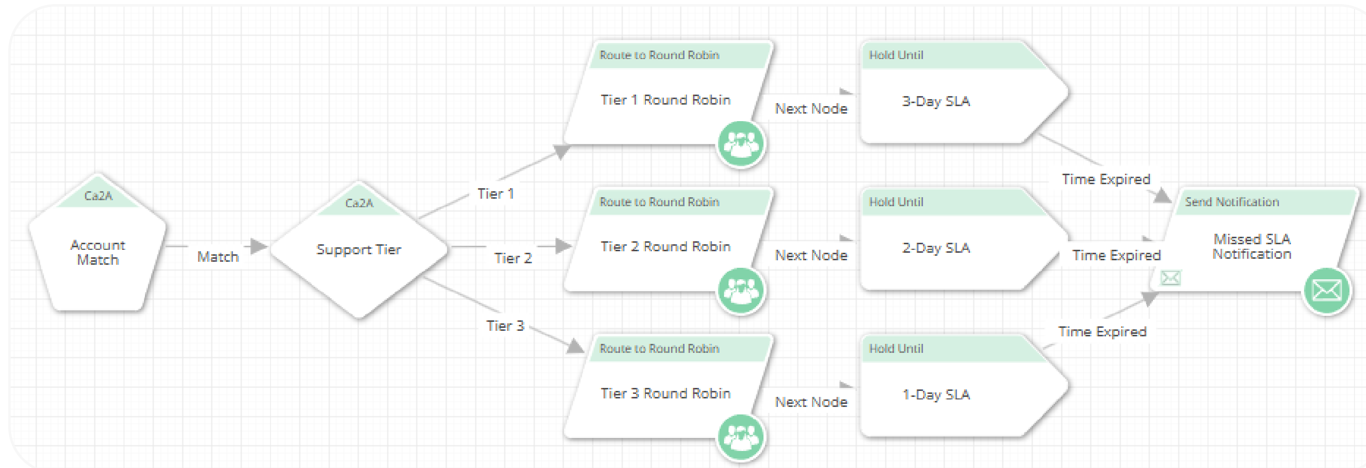
- Automate Sales to Customer Success handoffs and account ownership changes
- Auto create onboarding tasks based on product line
- Assign onboarding tasks among Implementation/ Customer Success teams
- Track SLAs around onboarding tasks
- Trigger Slack alerts when key onboarding steps stall
- Surface at risk onboarding through AI visibility tools

SUCCESSFUL OUTCOMES

- Make sure onboarding tasks get done on time
- Help customers get up and running quickly to see value faster
- Build strong connections between customers and their CSMs right from the beginning
- Boost product usage and adoption
- Prevent slow or stalled moments from becoming renewal risks

TIERED SUPPORT

Quickly route and escalate support issues to get them resolved fast and ensure customer satisfaction.



HOW WE FACILITATE

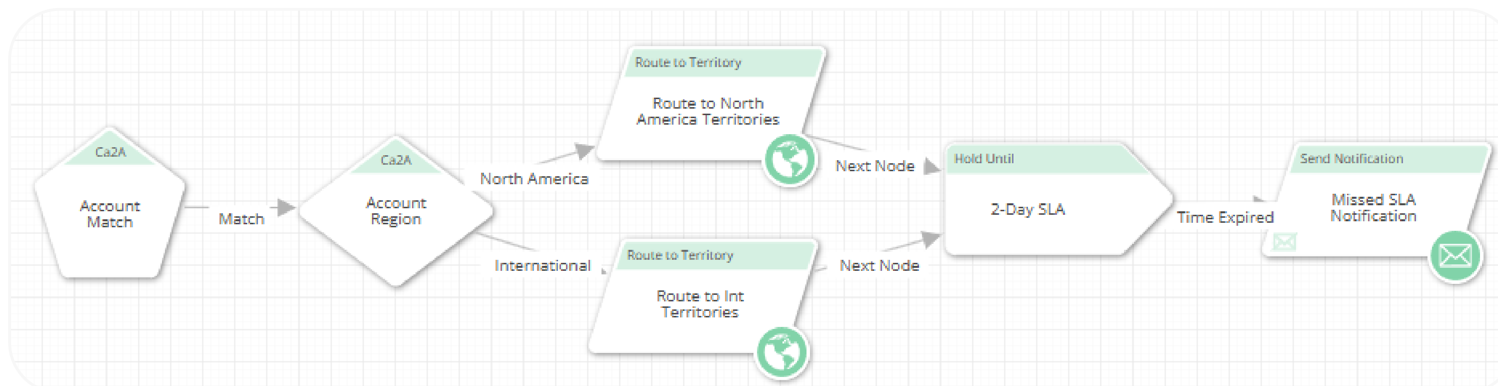
- Route cases based on support tier, case reason, or product type
- Assign work across teams based on skill and availability
- Auto escalate issues when SLA thresholds are reached
- Use business-hour-aware, real time routing to avoid delays and misroutes
- Keep routing logic in one place to prevent conflicts with older Apex rules or manual updates

SUCCESSFUL OUTCOMES

- Faster response to high priority issues
- Quicker resolution times across all tiers
- Accurate assignment based on skill and support level
- Less downtime or waiting for customers
- A smoother and more reliable support experience

SWARMING (POOLED) SUPPORT

Quickly send support issues to the right teams so problems get resolved fast and customers stay confident in the process.



HOW WE FACILITATE

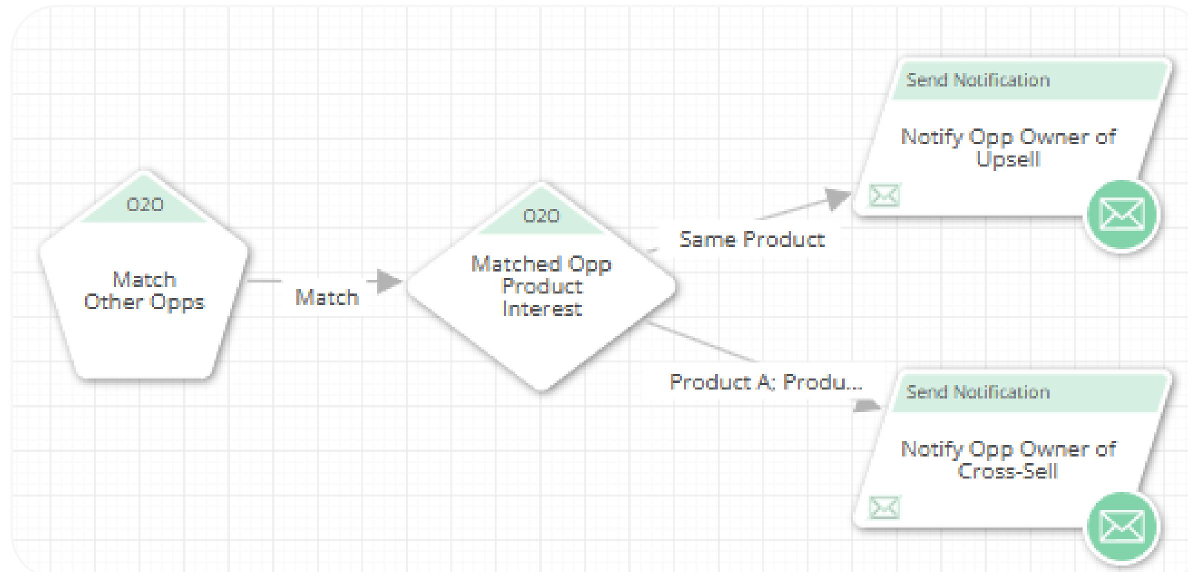
- Route cases using global round robin, skill based logic, and case load balancing
- Respect user schedules and PTO so cases go to teams who are online
- Auto notify the right team through Slack or Teams when issues need attention
- Reroute cases that sit too long to prevent delays

SUCCESSFUL OUTCOMES

- Faster resolution for a wide range of support issues
- More balanced workloads across teams and regions
- Better alignment between case needs and team skill sets
- A smoother and more consistent customer support experience

ACCOUNT EXPANSION

Automatically identify and manage cross-sell and upsell opportunities to grow customer accounts.



HOW WE SUPPORT

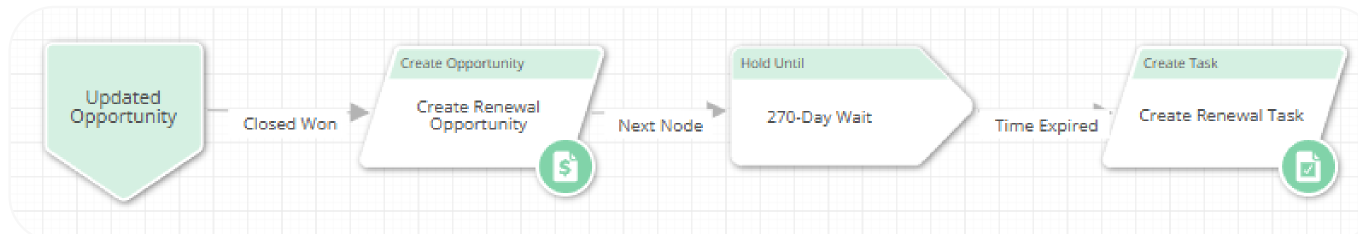
- Use AI to surface usage patterns, product interest, and renewal signals that point to expansion
- Auto route expansion opportunities to the right account manager or CSM
- Trigger cross sell and upsell workflows based on customer signals
- Coordinate actions across AM, Marketing, CS, and Support from one workflow

SUCCESSFUL OUTCOMES

- Connect with customers at the right time with offers that matter
- Grow accounts efficiently and proactively
- Strengthen relationships through timely and relevant engagement
- Increase revenue by expanding existing accounts

RENEWAL MANAGEMENT

Proactively manage customer renewals by automating tasks and sharing timely, helpful information.



HOW WE SUPPORT

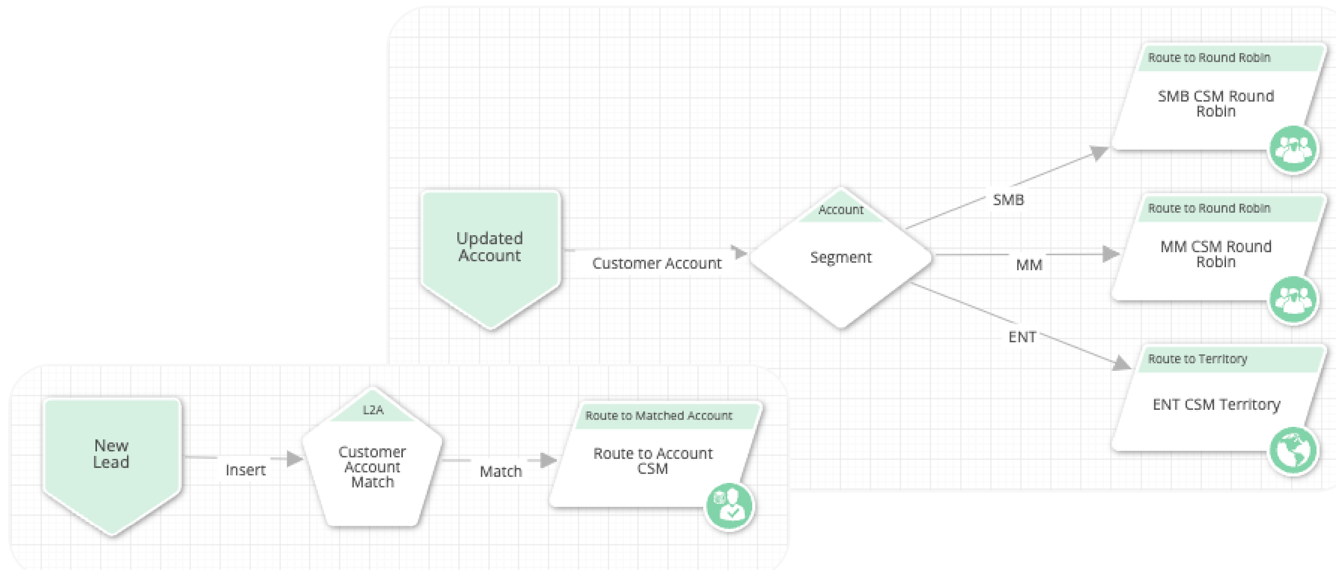
- Automate renewal activities, including reminders at key intervals such as 90, 60, and 30 days
- Trigger workflow paths for customers who show signs of risk
- Assign renewals to managers when engagement drops or key actions stall
- Create tasks for QBRs or re engagement based on customer signals

SUCCESSFUL OUTCOMES

- Deliver timely and personalized engagement with customers
- Strengthen communication with customers and build long term trust
- Boost customer retention
- Address renewal risks early before they affect the relationship

DEAL MANAGEMENT

Manage the assignment and follow-up of closed deals to streamline the internal processes needed to finalize transactions and begin service delivery.



HOW WE FACILITATE

- Identify key signals from new and existing contacts in customer accounts
- Use matching logic to improve the accuracy and effectiveness of assignments
- Route new leads and contacts from customer accounts using custom criteria
- Coordinate post sales steps such as upsell routing, contract reviews, pricing approvals, and CS workflows so nothing stalls during renewals or handoffs

SUCCESSFUL OUTCOMES

- Ensure the right person is engaged with each account at every stage
- Improve response times across post sales activities
- Reduce delays and bottlenecks in revenue related processes
- Support smoother transitions after deals close, from paperwork to service delivery

PART 03

LEANDATA CUSTOMER SUCCESS STORIES

REBUY AUTOMATES CUSTOMER ONBOARDING WITH LEANDATA

Rebuy uses LeanData to **replace highly manual processes** being used for account matching, customer onboarding routing and scheduling, and round-robin assignments from the BDR team to customer (merchant) success.

With LeanData, Rebuy has **automated handoff and routing between teams**, including from sales to customer success (merchant success) and from partnership team to sales.

They also created automatic workflows that **trigger based on customer activity**. These cover items such as when a customer installs, reaches certain usage thresholds, when accounts are showing growth potential or hitting specified revenue points.

Each has an **automatic flow with alerts** routed to the appropriate merchant success or growth team members.

REBUY

"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

GLOBAL TECHNOLOGY COMPANY ACCELERATES CUSTOMER SUPPORT WITH LEANDATA

A global technology company uses LeanData to **accelerate the routing and escalation of customer technical support tickets**. Streamlined and automated processes ensure customer issues are handled quickly, by the most appropriate subject matter experts (SME).

A **case is created and routed to the appropriate queue or engineer** based on account details, product category, and territory segmentation.

New cases are initially triaged in the appropriate queue, then assigned directly to an engineer.

Cases are escalated to higher level queues as necessary, depending on product categories, support levels, and territories.

Service Level Agreements (SLAs) prioritize certain types of cases, ensuring prompt resolution by SMEs. This **comprehensive routing system** includes categorizing cases by type, origin, and product category, supporting the company's global support network, including outsourced teams.

HOW LEANDATA'S REVOPS TEAM BOOSTS RENEWALS AND UPSELLS

Yes, we drink our own champagne.

LeanData's internal RevOps team uses LeanData as part of our customer renewal and upsell motions.

Depending on the date and stage of the renewal, LeanData will **trigger alerts and tasks** for the account manager (AM), such as customer usage, support tickets, customer news, etc. In this way the AM can **personalize their communications**.

Additionally, LeanData automation **looks for accounts that are at risk of churning** based on fields or criteria in Salesforce. Then, LeanData bubbles those renewal opportunities up to AM leadership through **Slack and email alerts**.

LeanData also **monitors G2 buyer intent to identify** upsell opportunities and churn risks. When someone researches LeanData or competitors on G2:

LeanData automation creates a new record for the G2 activity

Matches it to an existing account

Sends a Slack alert to the AM based on what the customer researched and what products they already have

CONCLUSION

CLEAN OPERATIONS, CONFIDENT TEAMS

LeanData does the heavy lifting behind your post sales work.

Our platform reduces manual effort by replacing scattered rules, hand-built workflows, and one-off fixes with clear, reliable orchestration. It connects the signals that teams depend on, then turns them into steps that run the same way every time.

LeanData can act on any data in your CRM, including renewals, product usage, account health, and licensing details. It streamlines key customer moments like assigning and scheduling onboarding tasks, routing support cases to the right expert, and alerting teams when renewal or expansion signals appear.

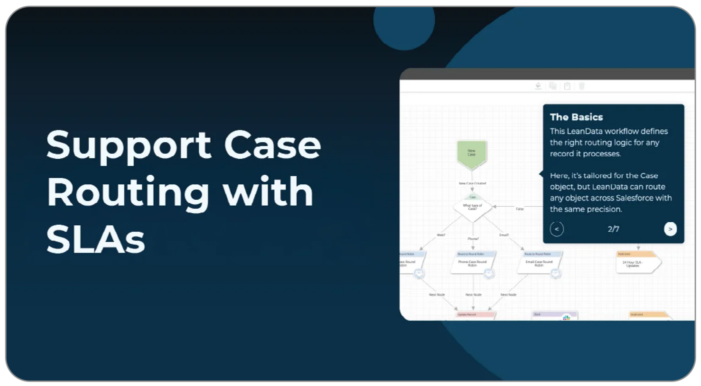
We help your post-sales activities stay efficient, accurate, and consistent across every team and region.

WANT TO SEE LEANDATA IN ACTION?

Reach out for a demo today

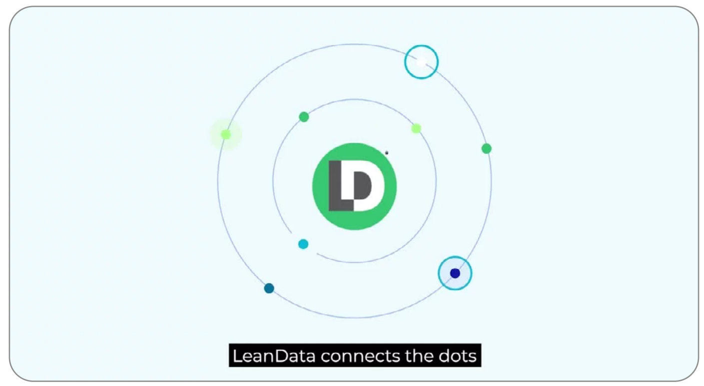
REQUEST A DEMO

RECOMMENDED RESOURCES



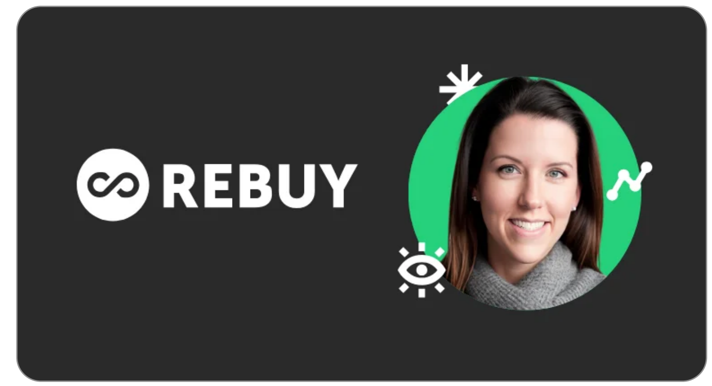
INTERACTIVE TOUR

[Improve Post Sale Experiences]



VIDEO

[LeanData Demo in 100 Seconds]



CUSTOMER STORY

[Rebuy Scales Revenue Operations with the LeanData Platform]

GET STARTED TODAY

Visit LeanData.com to learn more about LeanData's go-to-market operations solutions for Automated Scheduling, Matching, Routing and Buying Groups, or visit us on AppExchange.

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.