



Demand Concierge Execution

The Client:
Cloud Productivity Software Provider

The Situation

- Client possessed a base of customers (~25k) using legacy software offering of client (non-cloud)
- Channel Orders, Software Entitlement and Tech Support databases were not connected so visibility into customer usage was limited
- Client needed to understand who was still using their legacy software and offer a migration path to the latest cloud offering
- Client also needed to know which customers were not using their legacy software and understand why

The Solution...

01.

Merge the three data sources and analyze results to determine key assumptions around usage and customer experience

02.

Based on assumptions derived from the data KPI designed and deployed client branded customer surveys to each of three audiences

- Customers still using legacy product (64%)
- Customer no longer using the legacy product (27%)
- Unable to determine usage (9%)

03.

General focus of survey was to determine Current State (confirm usage/non usage) and Perceptions (current level of satisfaction and propensity to change)

The Outcome:

Survey was sent twice to each target (unless completed after first send) and yielded a 1.4% response (224 surveys) on user targets, .9% response (61 survey) on non-user targets and 1.6% response (36 surveys) on unknown targets

A Sample of Key Findings:

- ✓ Majority of Users were in the process of evaluating displacement options and were open to a migration path from the client
- ✓ Majority of Non-Users defected to other solutions based on recommendation of their reseller
 - Two resellers in particular seemed to be proactive in selling one specific competitor
 - Subsequent research by KPI determined that the specific competitor was running a lucrative spiff and other channel partners, and therefore end customers, would likely be affected
- ✓ Of the targets where usage was unclear, more than half of these were still using the product and were technically out of compliance with their license

Some of the things client was able to accomplish as a result of these findings were:

- ✓ Develop and communicate a migration path (to their Cloud offering) to customers
- ✓ Develop and communicate a spiff program to key reseller partners to mitigate competitive recommendations
- ✓ Quote and renew clients who were still using the product beyond their expiration date

Based on the result of this project, client engaged with KPI to design and execute an ongoing install base management program focused on retention, upsell and migration as well as customer case study content development for use in lead generation