

CASE STUDY

How Kentik Obtained a 4× Increase in CSM Productivity

14

PERSON CUSTOMER
SUCCESS TEAM

4×

INCREASE IN
CSM PRODUCTIVITY

1

WEEK
TIME-TO-VALUE

HIGHLIGHTS



Accomplished in a few days what competing tools couldn't do in a year.



Drastically reduced call prep time for CSMs.



Rapid setup and implementation.

THE CHALLENGE

Create an Effective “Home Base” for Customer Success

Kentik is a network observability company based in San Francisco, California. Kentik's customers use its platform to plan, run, and fix networks to increase reliability and uptime, as well as protect against DDoS attacks, monitor analytics, perform capacity planning, and more. The customer success (CS) team works primarily with network engineers.

Prior to 2020, Kentik's customer success team had been using a combination of different systems in order to service their customers. This included relying heavily on Salesforce, Pendo, and email. The need to

consolidate data into a single purpose-built CS tool led them to invest in a competing CSP.

Matt Cavanaugh, head of customer success at Kentik, tells the story. "We needed one place that was customer success-friendly. We were always bouncing around different tools to pull together pieces of data and tie it into one picture. That's a lot of time for CSMs and CSEs in prep."

This prep time isn't just a question of productivity, but also one of customer satisfaction. Cory Crabtree is a seasoned, strategic customer success manager who also took on CSP configuration for the team. According to Cory, "We work with network engineers who know their challenges very well. They need answers very quickly, and they expect us, as the vendor, to be an expert at understanding their data. The last thing that I want to do as a CSM is struggle to find the data when I know it's available to me - but I'm bouncing from tool to tool."

Kentik's first CSP investment did not live up to expectations. The slow speed of implementation and the complexity of configuration meant that Matt, Cory and the team were unable to get full value out of the tool even a year after first signing on. This is when they began a new CSP search and invested in Catalyst.

THE SOLUTION

Use Catalyst to Improve Customer Success Day-to-Day Operations

Among Kentik's primary and urgent goals with their Catalyst investment was to solve for day-to-day CSM workflows. One notable need was a better tool for logging customer call notes and account updates.

Kentik CSMs would be on calls where the customer would provide large amounts of information at a rapid pace. With Catalyst's advance note-taking functionality, a CSM is able to start transcribing notes, quickly pull up important information (e.g. renewal date, ARR), set up follow-up tasks, and submit comments for other CSEs on the account - all while still on the call with the customer.

Cory can't get enough.

"I've just been able to accomplish something that would've taken hours and several people to do. The time savings and value realization for me has been almost immediate. I got it in the first week of using Catalyst. I received a 3x to 4x increase in productivity."

Another issue Kentik faced when they were using the competing CSP tool was integrating their Salesforce data. While the other tool was able to ingest the data relatively quickly, it was a struggle to organize in a meaningful way. Catalyst, however, took in the same data and almost immediately gave Kentik the ability to segment their customers, set up various modules, information panels, and dashboards where a CSM could get an overview of all their accounts and drill down to the details of a single customer and how healthy they are. All this could be accomplished with a few clicks and without the need for extensive admin training.

Cory found great benefit in that and more. "We were able to create use-case visibility across all our accounts using custom fields. I created an aggregate of how many use cases per customer we have. We've never been able to do this before and it's super valuable." This link with Salesforce isn't just limited to data ingestion - it also includes bi-directional interaction. There are no longer any discrepancies between systems, and updates to customer profiles only need to happen once. This cleanup of Salesforce data is happening on-the-go as a byproduct of using Catalyst.

“Catalyst has made our job so much easier because it pulls together all aspects of the business and the customer into a single view and into a single platform. It has standardized our workflows, which used to encompass so many other tools, into one place. It has also helped us be more proactive with our customers; it’s only going to get better from here.

Matt Cavanaugh

Head of Customer Success, Kentik