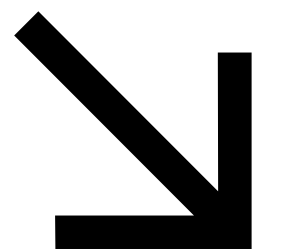
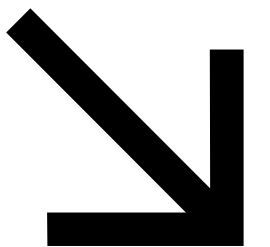


# Automating Customer Success With No Code

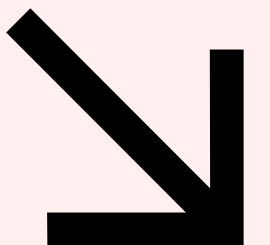


Customer success  
is a never-ending battle.

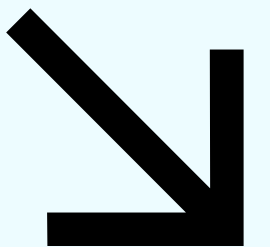


# Problems.

Can't afford a dedicated team member  
No time to do it proactively  
Doing nothing at all  
Poor adoption & high churn



**Solution: customer  
success automation.**



Trigger

Identify  
the touch point

Zapier,  
Integromat,  
CRM, native  
integration

Action

Communicate  
with the customer

@userlist

Trigger

Action

Identify  
the touch point

Zapier,  
Integromat,  
CRM, native  
integration

Email

In-app notifications

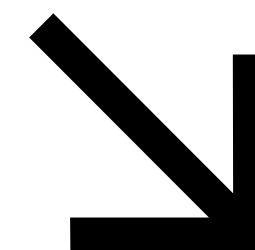
SMS, push, etc.

Survey tools

Reminder (e.g. Slack)

Manual

# Recipes: Easy



# Nurture & greet new demos

@userlist

New demo  
in Calendly  
or SavvyCal

Send lead to CRM

Nurture lead with email  
automation

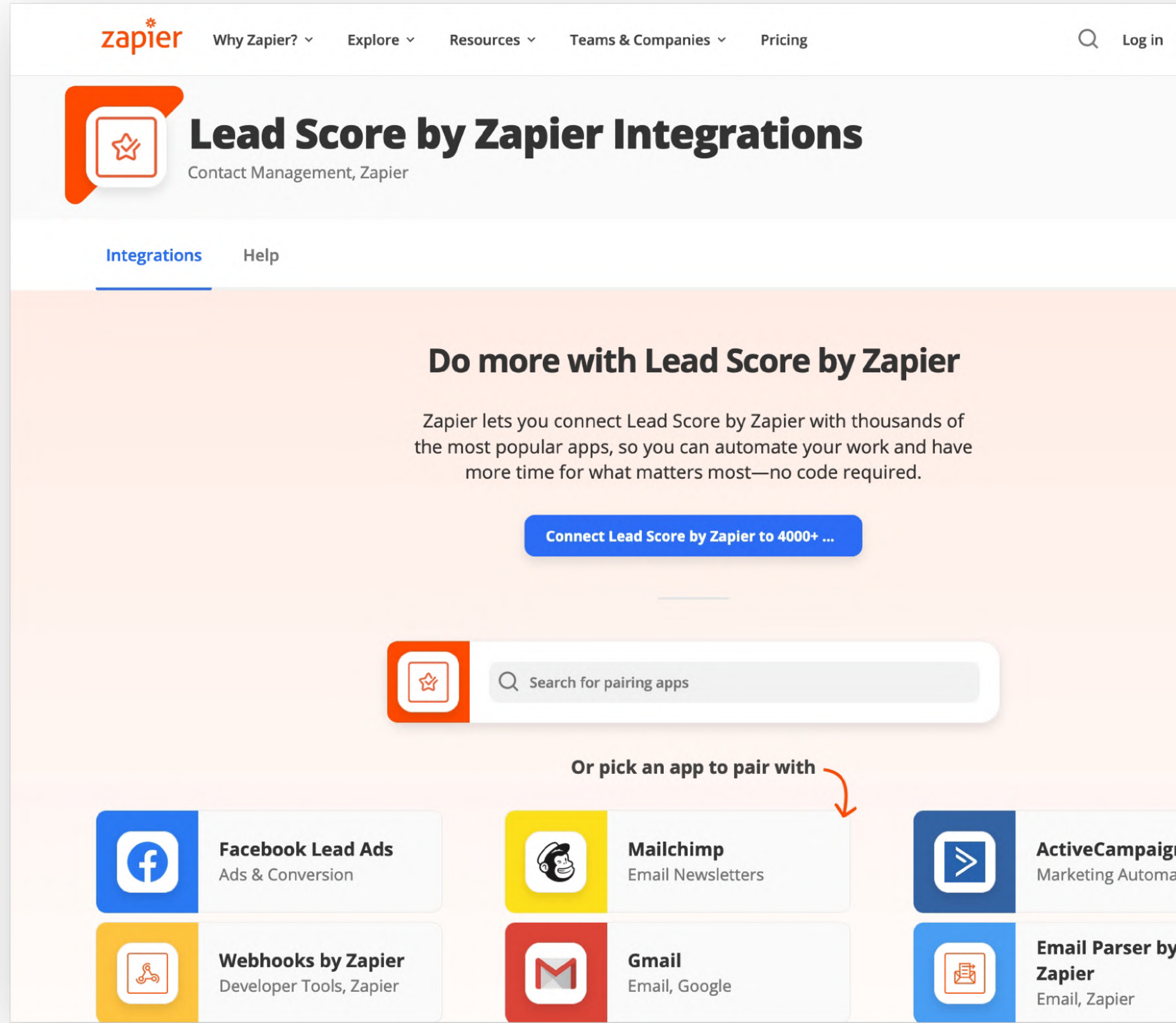
Send info to support inbox

Greet them  
manually



# Zapier Lead Score

Helps identify high-value leads and customers



zapier Why Zapier? ▾ Explore ▾ Resources ▾ Teams & Companies ▾ Pricing

Search Log in

## Lead Score by Zapier Integrations

Contact Management, Zapier

Integrations Help

### Do more with Lead Score by Zapier

Zapier lets you connect Lead Score by Zapier with thousands of the most popular apps, so you can automate your work and have more time for what matters most—no code required.

Connect Lead Score by Zapier to 4000+ ...

Search for pairing apps

Or pick an app to pair with

- Facebook Lead Ads  
Ads & Conversion
- Mailchimp  
Email Newsletters
- ActiveCampaign  
Marketing Automation
- Webhooks by Zapier  
Developer Tools, Zapier
- Gmail  
Email, Google
- Email Parser by Zapier  
Email, Zapier

# Reach out to promising accounts

@userlist

New lead or  
customer  
in CRM

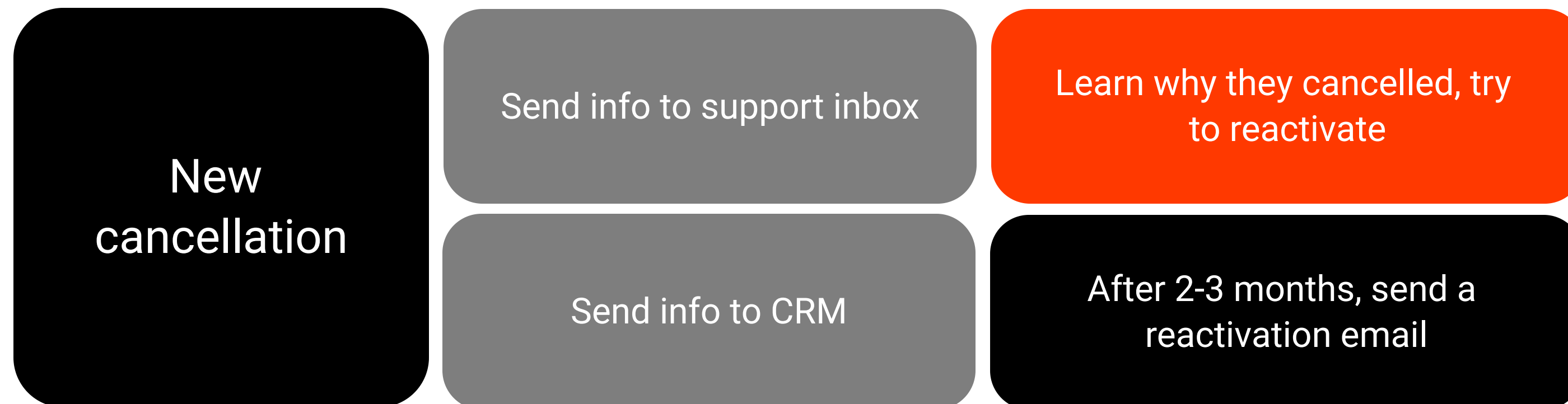
Zapier Lead  
Score > X

Notify the CS team  
via Slack

Talk to the  
promising account

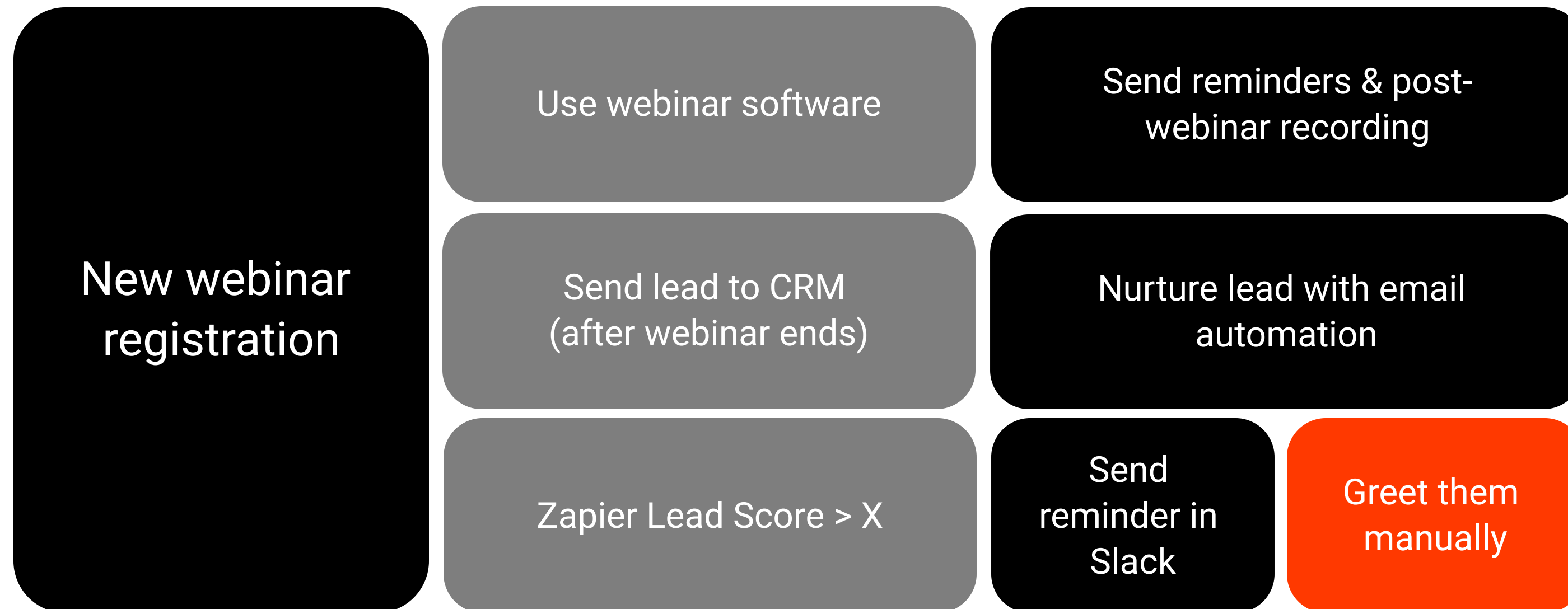
# Reactivate cancelled accounts

@userlist



# Webinars

@userlist



# Pre-recorded demos

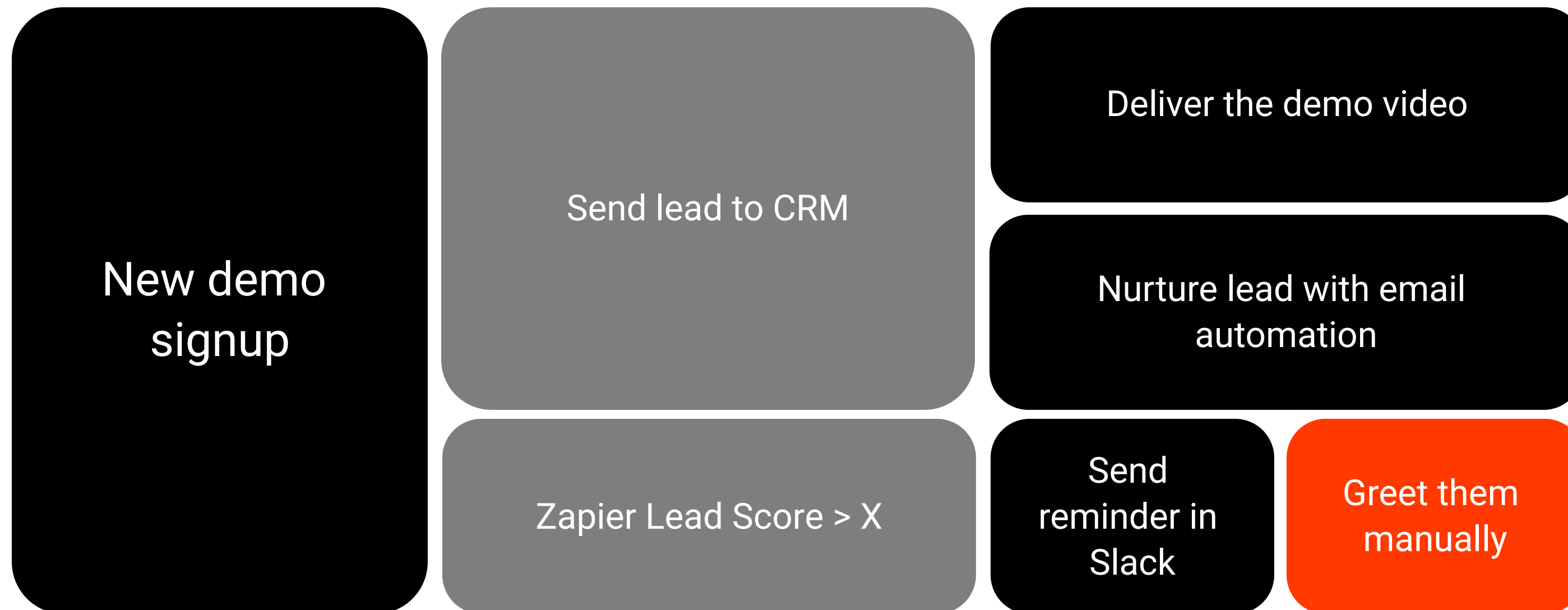
- ❑ Save time
- ❑ Capture and nurture leads
- ❑ Great for introverted customers

The image shows a pre-recorded demo of the Userlist platform. The top part is a dark-themed landing page with the Userlist logo in the top left, 'Sign In' and 'Start Free Trial' links in the top right, and a large headline: 'Marketing & Lifecycle Email for SaaS. Under One Roof.' Below the headline is a sub-headline: 'Nurture your SaaS leads, convert them into customers with evergreen sales campaigns, and then smoothly transition to user onboarding. Onboard and engage company accounts, not individual users.' At the bottom of the landing page is a white input field labeled 'Your email address' and a blue button with a play icon and the text 'Watch the Demo'.

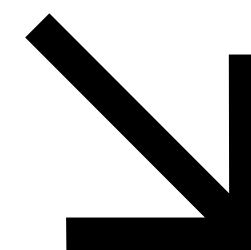
The bottom part of the image shows a screenshot of the Userlist web application interface. The top navigation bar includes the Userlist logo, 'Users', 'Automation', and 'Broadcasts' tabs, and a user profile for 'Jane Portman / Sparkle.io'. A left sidebar lists various campaign types, with 'General onboarding' highlighted in green and marked as 'Active'. The main content area shows the configuration for the 'General onboarding' campaign, including a 'Trigger' section and a 'Messages' section. The 'Messages' section lists two messages: 'Welcome to Sparkle.io' (Send after 1 day to certain users on) and 'Check out Sparkle.io knowledg' (Send after 3 days). A preview window on the right shows the content of the 'Welcome to Sparkle.io' message, which includes a friendly welcome and some placeholder text.

# Pre-recorded demos

@userlist

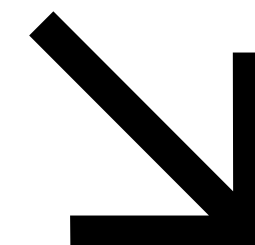


# Recipes: Advanced



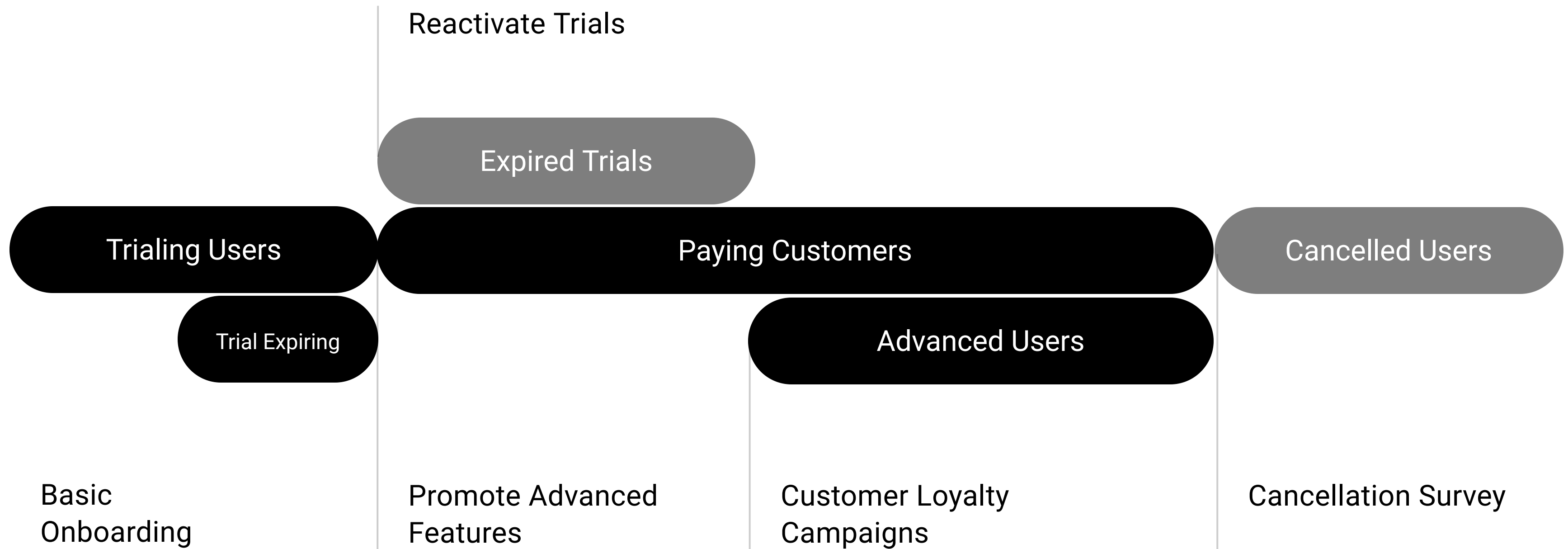
# Integrate once, no-code forever.

- ❑ Send behavior data to a CRM like Userlist
- ❑ Segment users based on data
- ❑ Trigger automations based on segments





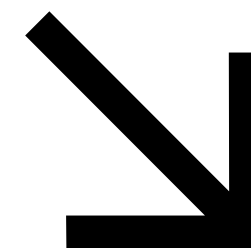
# Free trial model



# Freemium model



# User onboarding campaign.



# Basic onboarding campaign

@userlist

## Basic Onboarding

Send to everyone

Welcome message

Send to everyone

Offer a call

Not using feature A?

Offer help for A

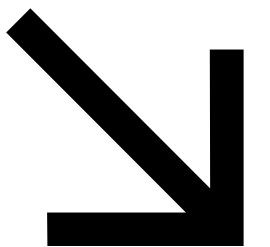
Not using feature B?

Offer help for B

## Trial Expiring

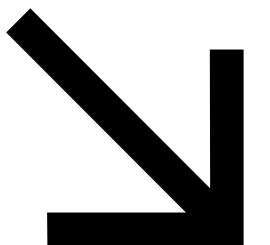
Your trial expires tomorrow

# Customer loyalty campaigns.



@userlist

(Nobody does it.)



NEW YORK TIMES BESTSELLING AUTHOR

— GARY VAYNERCHUK —

★★★★★ PRESENTS ★★★★★

JAB, JAB, JAB,

RIGHT

HOOK

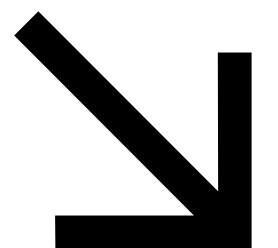


HOW TO TELL YOUR STORY  
IN A NOISY SOCIAL WORLD

@userlist

# To give

- Review or strategy calls
- Advanced training resources
- Events
- Affiliate terms
- Discounts
- Swag or gifts

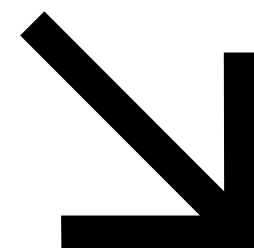




@userlist

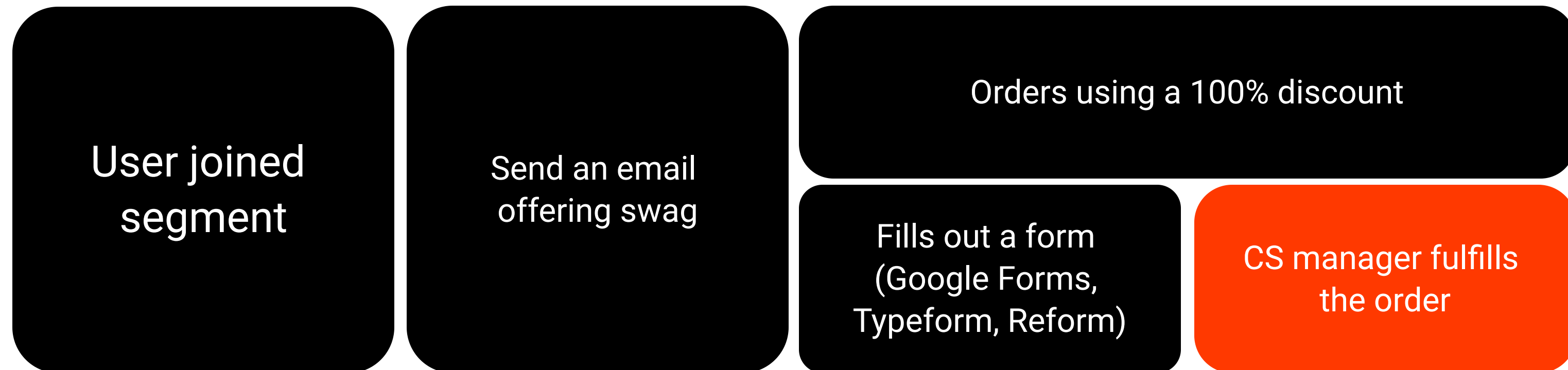
# To ask

- Feedback (free-form or surveys)
- Referrals
- Testimonials



# Automate your swag process

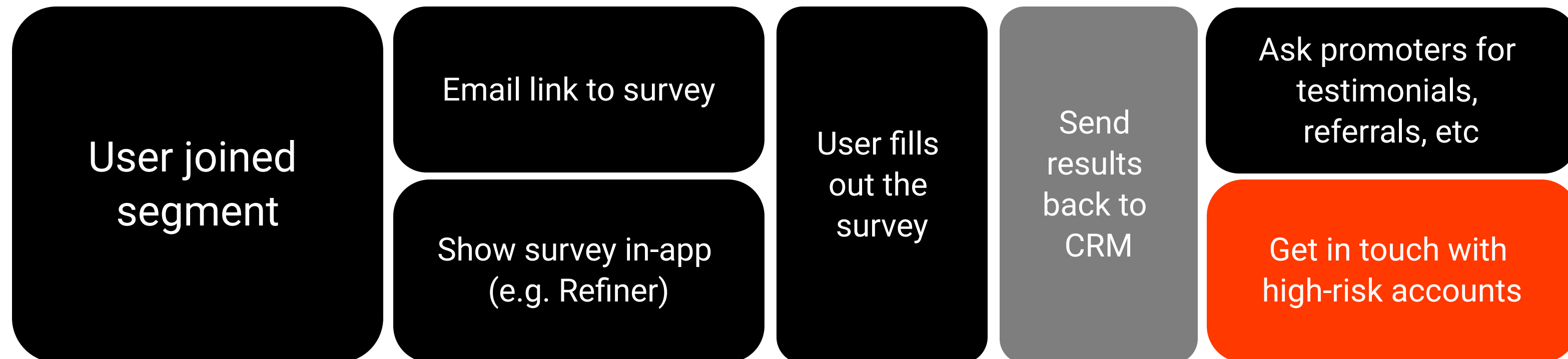
@userlist



# Automate surveys

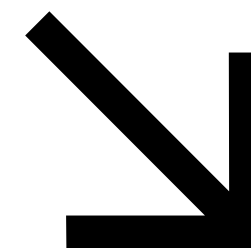
@userlist

- Keep them always relevant
- Act on the results

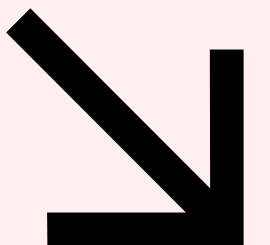


@userlist

# Final words.



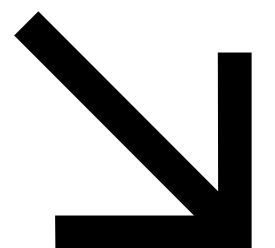
Don't think that others  
have figured it out.



@userlist

# Build your assets

- Help documentation
- Blog posts and guides
- Worksheets
- Videos
- Onboarding calls
- Workshops and webinars
- Custom roadmaps
- Concierge onboarding

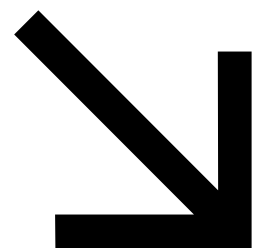


# Founder stories

<https://userlist.com/podcast>

BETTER  
DONE than  
PERFECT

BY USERLIST



# Thank you.

Join Userlist today and get \$500 in credit.

For companies who have raised less than \$500k in funding.