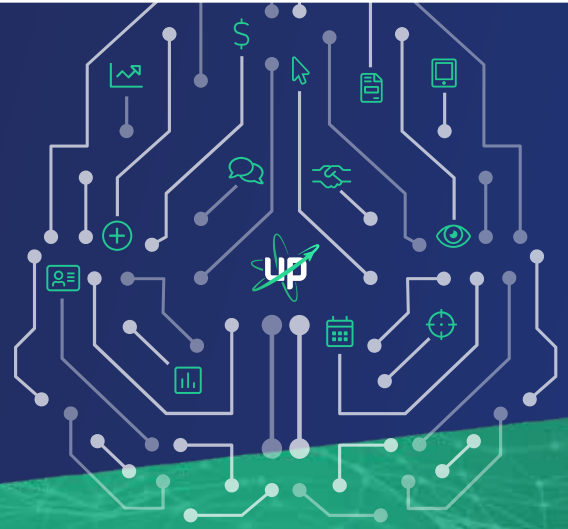


CASE STUDY

Uptick boosts renewal rates with AI-guided customer success



Executive Summary

Founded in 2010, Sumo Logic grew from a small team to an enterprise-level company in less than a decade. The rapid growth and success in adding large numbers of new customers made it increasingly difficult to remain intimate with every customer. Prior to deploying Uptick, Sumo Logic had no reliable way to predict whether an account would churn, or which features would likely lead to renewals, upsells and expansions. After trying other customer success platforms—including Salesforce and Totango—Sumo Logic knew they needed more thorough, actionable insights to further decrease churn rates. The executive team was initially skeptical of AI and machine learning capabilities, as most companies used it as a buzzword without practical applications.

The Client

Sumo Logic is a continuous intelligence platform for DevSecOps, helping more than 2,000 enterprise companies collaborate, develop, operate, and secure their applications at cloud scale. Their mission is to be the leading machine data analytics platform that delivers continuous intelligence for modern applications—so modern businesses can make smarter decisions, faster.

The Challenges

- Had excellent understanding of product usage, but lacked clear understanding of which features were sticky and lead to renewals
- Accounts where no activities were displayed, despite actual activities taking place
- No insights into what kind of client usage they should encourage for increased retention rates and upsells
- Needed to increase user adoption and usage
- Track team interactions with customers to better understand needs
- Were using Net Promoter Scores (NPS) to analyze success, but only received a 2% response rate.
- Drive more value from Gold and Silver accounts (\$50k-\$1M)
- Missing and misrepresented data

The Solutions

As an AI, machine-learning sales and customer success platform built to support B2B SaaS subscription-based companies, Uptick had a deep level of insight into the challenges and obstacles faced by Sumo Logic.

Once fully onboarded, Uptick's unique machine learning capabilities were able to support Sumo Logic's sales and customer success teams and better position them for short- and long-term success.

Uptick's Brain analyzed 18 months of historical data across thousands of data points and identified behavior patterns of users that were highly correlated with renewals, upsells, and churn. This included data from Salesforce (accounts, purchase history, product, organization hierarchy), G Suite (emails, attachments, meetings, to's/from's and CC lists, names and titles), and product data (consumables, operational metrics, individual user behavior, search types, overages).

Powered by machine learning, Uptick's micro-segmentation feature allowed Sumo Logic to analyze individual customer behavior and isolate sticky features unique to each user. Providing personalized recommendations for each account, sales and customer success teams were given actionable insights that, when taken, were more likely to lead to renewals and upsells. The platform then assigned unbiased Win Predictions to each account that forecasted their likelihood of renewal if the recommended actions were taken.

Next, Uptick's customer and team engagement feature gave managers unparalleled insight into how team members were interacting with users, and whether they were acting on Uptick's recommendations. The team engagement and email activity stream analysis highlighted the behavior of top performers, and provided best practices for other team members based on behaviors proven to be successful.

The Results

Uptick's advanced machine-learning and AI platform enabled the Sumo Logic team to more effectively manage relationships and increase subscription revenue. Using the Uptick rich data in correlation to actual outcomes, Sumo Logic was able to understand their user's multi-year journey to get the most out of their products and features. Without having to rely on input from the team, real time and historical data revealed exactly what was happening at the customer level.

Uptick's Value Attainment demonstrated how effectively Sumo Logic's security features were being used, and correctly identified previously unknown factors that were directly impacting churn rates. One of the most valuable insights from their continued engagement with Uptick, was the discovery of thousands of actively engaged contacts that were not included in any other systems of record. The discovery of these "invisible" accounts has enabled Sumo Logic to effectively nurture them and provide the same level of service as other accounts in their system.

Key Takeaways

- Uptick has been very beneficial in helping us understand who our most engaged customers are, and provide personalized recommendations on the next best action to take for each customer to maximize the amount of value they receive.
- Have a better understanding of how specific features and capabilities are related to different types of user groups and how they correlate to renewal rates.
- Visibility between the customer and company has helped us understand the cadence of communication throughout the annual subscription cycle.
- Micro-segmentation is unbelievable in how it uses data to really figure out how our product works and why our customers buy—these are the factors that impact our renewals. The What If impact analysis works out what to do next with customers.