

3 Ways Data Makes You More Proactive in Customer Success

Proactivity is the key to reducing churn, increasing expansion, and building trust with customers. The right data doesn't just tell you what happened — it helps you see what's coming and take action before issues escalate. Here are three powerful ways data empowers proactive customer success teams:

1. Identify Risk Before It Escalates

By analyzing historical behavior patterns, product usage trends, and engagement metrics, data helps you spot early warning signs (e.g. a sudden drop in usage or delayed onboarding milestones) based on how similar customers behaved in the past.

WHY IT MATTERS

This enables CSMs to reach out with support, guidance, or strategy resets before dissatisfaction turns into churn.

TOP TIP

Set up a report that shows accounts at risk, 6 months before renewal and flags any early warning signs. Reviewing this regularly gives you the time and visibility to course-correct before it's too late.

2. Uncover Hidden Expansion Opportunities

Expansion signals show up in the data: a spike in usage, new teams joining, execs logging in, or feature adoption spreading. These patterns reveal where your product is gaining traction, so you can proactively offer more seats, unlock new features, or introduce complementary products.

WHY IT MATTERS

Once you've spotted an upsell opportunity, use anonymised data from other customers who have upsold, to show the customer the value they could be getting.

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3. Leverage Data to Drive More Value for Customers

Data isn't just for spotting risk or growth—it helps you show customers that they are actually getting the value they signed up for. Track usage against key milestones, outcomes, and behaviors so you can see where customers are off-track and step in before they stall.

WHY IT MATTERS

Delivering value isn't about waiting for questions, it's about anticipating needs. When you align interventions to where customers are stuck or underutilizing, you improve satisfaction, retention, and long-term success.

TOP TIP

When it comes to value stories with data, don't just focus on the lagging indicators (outcomes), focus on the leading indicators too, that show that the value is on it's way. Use those leading indicators to know if you need to change tact with a customer or double down, in order to reach the value.