

Automating Key Customer Journey Milestones in Hook

One of Hook's biggest benefits is the ability to remove manual work from a CSM, AM or Renewals Manager's plate. If there are set things that your team are manually repeating for every customer, Hook can automate those tasks to allow your team to spend time where it matters most: with customers.

There are lots of use cases for automations, but automating customer communications from across your customer journey or lifecycle is a really easy place to begin.

Here's a few ideas to get you started:

WELCOME EMAILS & SIMPLE ONBOARDING JOURNEYS

Automatically send welcome emails to new stakeholders and users, and send them on simple linear onboarding journeys to help them get set up.

Trigger: Use "If *customer/user filters* are met" conditions, and leverage fields such as "Active Customer" or "Created Date" to ensure automations don't re-run.

NEW USERS AND STAKEHOLDERS OUT OF CYCLE

Turnover within a customer account can seriously damage adoption. Whenever new users or stakeholders join and start using your platform, automatically enrol them in an onboarding journey or send them the key content they need to get up to speed.

Trigger: Use "If *user filters* are met" in a user automation. For new users, filter by "Created Date". For new key stakeholders, apply a filter where the user type is set to "Influencer".

RENEWAL NOTIFICATIONS

Still pulling reports of upcoming renewals and manually drafting notification emails? Automate this process entirely, sending different cohorts of customers bespoke notifications (e.g. send different comms to auto-renewal customers and accounts that may need negotiating).

Trigger: Use "If *customer filters* are met" and filter by "Renewal Date" (or your equivalent field imported into Hook). Set the date condition to "Relative Dates → Next 180 days"

ELEVATE YOUR COMMS

Customers are now leveraging Hook agents to drive every customer down a unique path to hit onboarding outcomes, or to handle customer communications with personalised content, instead of leveraging pre-defined automated journeys.



Looking to make more engaging content?

Leverage Hook's HTML editor to bring your brand to life in customer comms, and make your content more engaging.

