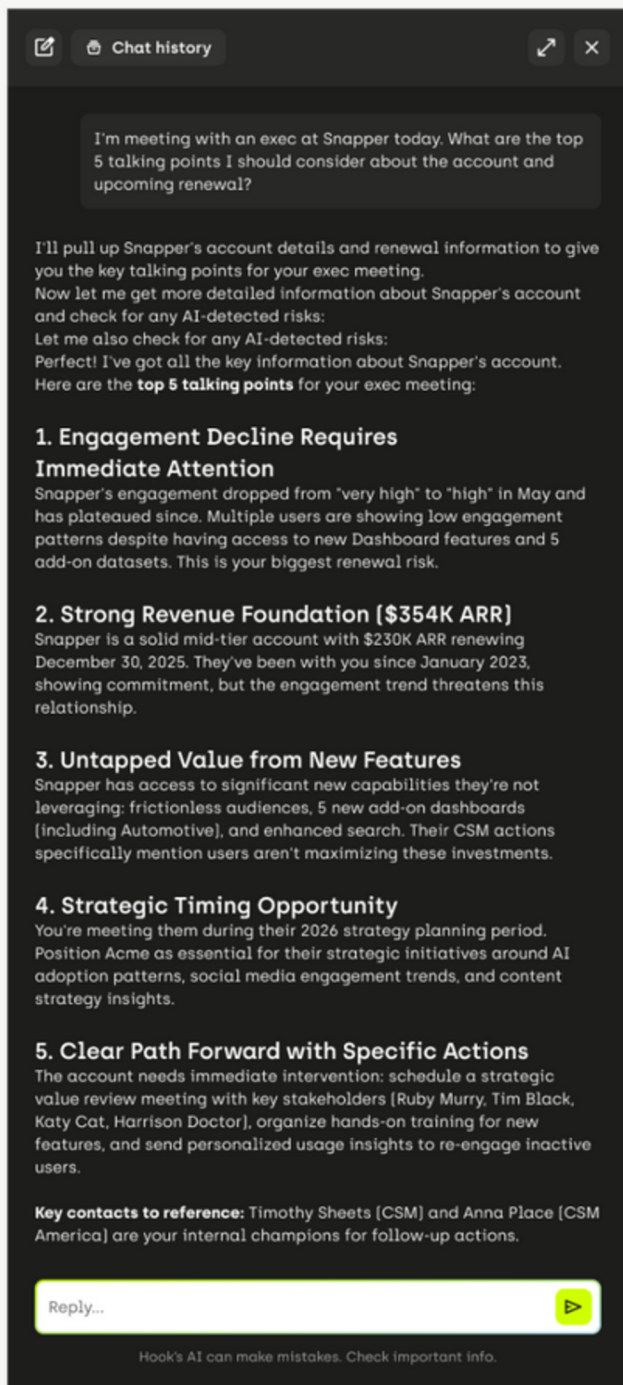# Your Best CSM, Now Available in Chat

Answers, insights, and priorities — so your team can act faster and win more

What if working with customer data felt as natural as having a conversation?

Whether your CS team is prepping for a renewal, trying to understand risk, or answering an ask from your CEO, it shouldn't take hours to get answers. Chat surfaces what matters in seconds so your team can move faster, stay focused, and provide value quickly.

No more jumping between dashboards, stitching together spreadsheets, or waiting on Ops to pull what you need. This is a new interface for Customer Success — one that gives your team instant access to the right insights, the right context, and the right next move.

The Business Impact of Chat

Protect Revenue at Scale
Surface at-risk activity in your accounts before they churn and impact your bottom line

Multiply Team Efficiency
Replace hours of digging with instant answers, freeing up time for strategic, revenue-driving work

Focus Where It Counts
Get both granular and portfolio-level views on demand and know exactly which accounts to prioritize

Built for How You Actually Work

This isn't your regular support chatbot. Chat pulls live insights from your accounts, so you can ask anything and trust the answer so you can lead with confidence. You'll see tangible ways to reduce churn and identify expansion opportunities. e.g. 'Which priority stakeholders should I engage?'

"The situation overview is a quick summary I can provide to leadership when asked about an account... and I LOVE the immediate action recommendations. This chat thinks like a CSM."
– AMBAR ESTEVEZ, SALESLOFT