Spear Education

Project Scope

Client: Spear Education
Timeframe: 6 weeks

Role: Market Analyst Team: Marketing Team

Methods: Surveys, Personas, Interviews, User Journey

Tools: SurveyMonkey, R

Time: 2016

Project Overview

Backstory

Spear Education sold a curated set of post-secondary continuing education credits for dentists, including several subscription products. However, they hit a snag.

While they had a great client base, their retention for subscription products had dwindled down to \sim 40% in some areas. Given U.S.-based dentists is a fairly small user base, they were in danger of churning through their entire potential customer base unless they found what was causing turnover.

Objectives

- What is causing customer churn?
- Where are our customer pain points in our customer journey?
- How can our processes be amended to stop the bleed?

Methods

Surveys

The first step was to create an online survey to send to our recently churned customers to get immediate insight.

- On a scale of 1-5, how would you rate your onboarding, materials quality, and ongoing support?
- Why did you leave our service? (open-ended)

Would you ever consider using our service again? (open-ended)

I used a strong emphasis on open-ended questions, because I wanted to hear what our users found the most problematic. I wanted them to vent and curse at us, so I could understand their perspective. A rating of each stage of the customer journey allowed us to better understand at a quantitative level where the breakdowns were happening most often.

Personas

Based on the survey results gathered here and from previous projects, I created personas to demonstrate our customer's issues. These were backed up by direct quotes from the surveys, underlining where the breakdowns were occurring.

User Journey (re) Mapping

Our team already had a user journey, but thanks to extra information from our user survey and internal interviews, I was able to add overlooked steps and emphasize where different personas were getting knocked off the happy path.

In particular, while we had smoothed the onboarding perfectly, the follow-up was breaking down. Once users were on the platform, they could get confused about their next steps. Worse, because their primary point of contact had been a salesperson, they were often unable to talk to the same person to get assistance.

Outcomes

The chief outcome for this study was a company reorganization. Salespeople were divided into Initial Sales and Customer Success, with one to two customer success advocates supporting each salesperson's business. This allowed for a smooth hand-off from sales to ongoing support, and a single point-of-contact for our customers' needs throughout their journey.

Our customer service people, incentivized by a retention-based commission, actively reached out to their customer portfolio to ensure they had everything they needed. This change led to an increase in retention from ~40% to ~70% within a single quarter.