

## CASE STUDY

# How Braze Increased Customer Success Platform Engagement by More than 220%

60+

CUSTOMER SUCCESS MANAGERS

40+

ACCOUNT MANAGERS

6

OFFICES ACROSS 4 COUNTRIES

## HIGHLIGHTS



Onboarding was fast and simple



CS Platform usage increased by 222%



Catalyst is now used by multiple departments, including C-Suite

## THE CHALLENGE

### Find a Platform to Augment CSMs' Workflows and Become the Post-Sales Hub

Braze is a Customer Engagement Platform that specializes in delivering messaging experiences between consumers and the brands they love. The New York City-based company was founded in 2011 and has been rapidly growing ever since, securing its Series E funding in 2018. In 2019 Braze was named a Leader in Gartner's Magic Quadrant for Mobile Marketing Platforms and in 2020 was named a leader in The Forrester Wave: Mobile Engagement Automation, Q3 2020. Last year, Braze's Customer Success (CS) team sought to replace its current CS platform for one more fitting of its growing needs.

“At the end of the day, what sank our last CS platform was adoption. No one wanted to use it,” said Scott Dzialo, Director of Customer Success at Braze. Braze’s previous CS software had less than 20 active users and was only being accessed on average once every 10 days, despite having a team of 60+ CSMs. Salesforce wasn’t scalable as the source of truth so Braze needed a place where the post-sales organization (and beyond) would actually live and work.

In searching for a CS platform, the criteria Braze cared most about was having a platform that actually makes people more efficient at their job. With smart, strategic CSMs, they wanted a tool that would augment their workflow. The team also wanted to find a platform that could be easily adopted across the organization—not just by CSMs—but by Account Managers and leadership as well.

Other search criteria important to Braze’s CS team included a solution that would allow

them to centralize all of their information in a way that was dynamic, searchable, and actionable. They wanted to ensure that this new solution would allow them to clean up and update their Salesforce data, give them a 360 degree view of their account information, provide accurate usage alerts, and robust health scoring capabilities that actually show the causes of the changes to health—all within a system that could be accessed by everyone at their company, making it the company’s post-sales hub.

During this search, Braze was already in the midst of rapidly growing its team and customer base, which meant the chosen solution needed to be able to be implemented quickly, and enable new team members to dive right in. Speed of adoption was incredibly important.

With all of that in mind, Braze found Catalyst to be the best-fit solution to take their global CS team and CS strategy to the next level.



What excited me most about Catalyst was that they were taking an entirely new approach to Customer Success compared to all the other software on the market. Their vision aligned perfectly with ours, and given their competitive and unique pricing model, I felt that we were receiving immense value.

**Scott Dzialo**

*Director of Customer Success, Braze*

## THE SOLUTION

## Rapidly Roll out Catalyst Across the Customer Success Team and Broader Organization

Catalyst is now the CS operating system at Braze. When launching the new tool, Braze consulted with the Catalyst CS team on a plan that would help them quickly drive adoption and scale use of the platform. They started with their three most important requirements: reporting, account views, and dynamic note-taking. They created customized views within Catalyst for each role, team, and department, which allowed everyone to jump in and start using it right away.

The simplicity and speed of onboarding, the Salesforce integration, and the clean UI/UX allowed team members to intuitively understand how to use Catalyst and get value out of it off the bat, which further engaged them with the software. As a result, when Braze's leadership began adding in more advanced features and customizations, team members were excited rather than deterred or overwhelmed.

"Having product adoption data and usage metrics in Catalyst and being able to

combine it with our Salesforce data is amazing, especially regarding how easy it is to use that combined data to create, tweak, and finesse our health scoring," said Lauren Francis, Salesforce Administrator at Braze.

With their previous CS software, 18 CSMs were logging in an average of 1 time every 10 days. Since adopting Catalyst, usage has increased by more than 220% to over 55 active users. CSMs start and end each day in Catalyst, take hundreds of notes every week, and update account information daily, leveraging Catalyst's Salesforce integration to clean up and continuously update account information in SFDC.

Adoption continues to grow across the organization, and Catalyst is now also used by Braze's C-suite to get important insights quickly, and to get notified when there is an escalation that requires leadership involvement. Braze truly views CS as a company-wide mission, and Catalyst is proud to be supporting their team.



My first impression of Catalyst was that it was incredibly fast and that everything I needed to see was right there in front of me. I didn't even need to get on a call to understand how to use it or navigate through ... With our previous software, it was so difficult finding the information I needed, like contract end dates, monthly active users, emails sent, etc., but with Catalyst it's all right there. I have three tabs open on my computer at all times: Inbox, Calendar, and Catalyst.

**Shezeen Ali**

*Customer Success Manager, Braze*

## What's Coming Next

Now that Braze has seen such incredible adoption across its CS team, they are focusing on onboarding their entire international sales department. They are also working to leverage Catalyst's powerful automation and integration capabilities to further streamline workflows and become increasingly proactive.

Finally, as their company continues to grow rapidly, standardization of reporting and forecasting is becoming increasingly critical, so they will be further capitalizing on Catalyst's ability to combine data from multiple sources and present it in a way that is easy to visualize, understand, and update.