

THE 5 BEST WAYS TO USE AUTOMATION INTERNALLY



Usage or health score alerts

When these metrics drop below a certain threshold, so a save play can be triggered.



Super user identification

When usage or engagement is outstanding, to identify expansion, reference, or case study opps.



Scheduling reminders

When it's time to schedule an EBR or start planning for renewal (way ahead of time).



Support ticket alerts

When the number of support tickets spikes, so you can investigate what's going wrong.



Templates!

So your CSMs can *finally* stop copying & pasting the same email to their whole book