Custify

Forecastr Success Story

forecastr

Reduced churn by 50% in 9 months

Increased customer health scores by 25%

Boosted the CS team's efficiency

Client Overview:

Forecastr is an online platform that helps founders build financial models for their businesses. The platform provides tailored financial models, with the help of analysts who work with founders to understand their unique needs.

Industry: B2B SaaS   **CS Team Size:** 14

The Challenges:

Prior to implementing Custify, Forecastr lacked insight into the health and behavior of their customers in general and their high-risk customers in particular. As a result, they were struggling with a high churn rate that constrained their growth.

In addition, they also faced the following challenges:

- Their data was distributed **across too many systems**, which made it **hard to manage and access.**

- They had trouble **understanding their customers' behavior**, which made it more difficult to **offer proactive support.**

- Their management struggled to **monitor and report** on CSM performance and internal CS metrics.

Solution with Custify:

To resolve their challenges, Forecastr implemented Custify. Here's what happened:

- Forecastr now has **a single source of data** for customer behavior, usage patterns, and customer health.

Custify

- Thanks to via **Lifecycles** and **Global Health Scores**, they can identify their medium- and high-risk customers and create **tailored strategies** for them.

- Forecastr's management now has a **complete overview** of their CSMs' performance and internal metrics via **Dashboards**, allowing them to make **informed refinements** to processes.

The Results:

After implementing Custify, Forecastr has been able to:

- **Reduce** their **churn rate by 50%** over the course of 9 months.

- **Boost customer health scores** across the board by 25%.

- **Improve the performance** of their CS team by tracking internal metrics such as **health scores per CSM** and **churn rate per CSM.**