

This sheet is a handout material from Udemy course:

[Essentials of Software-as-a-Service \(SaaS\) Business.](#)

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## Proactive Customer Support and Continuous Engagement

Onboarding is just the first phase of retention. Beyond that, sustaining engagement and satisfaction requires **proactive customer support and outreach throughout the customer's lifecycle**. "Proactive" means you don't wait for a customer to encounter a problem and contact you. Instead, **you anticipate needs or issues and reach out first, or at least respond very quickly in helpful ways**. A delighted customer often cites great support as a reason for loyalty. Let's explore how SaaS companies handle support in ways that drive retention and even advocacy.

### Fast, Multi-Channel Support

**89% of companies believe that excellent customer service is critical for retention.**

Users expect quick answers. Having responsive support channels like chat, email, phone for enterprise is really important. According to a retention stat, **89% of companies believe that excellent customer service is critical for retention.**

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Quick resolution of issues prevents frustration from festering. Many SaaS companies have in-app chat where users can ask questions on the spot. Even if it's not 24/7 live, a swift reply, within a few hours, can make users feel taken care of.

## Customer Success Management (CSM)

**Customer-centric companies are 60% more profitable than those that aren't.**

For B2B SaaS companies, assigning a dedicated Customer Success Management (CSM for short) or account manager for larger accounts is a common practice. These managers **check in regularly, provide business reviews, and help the customer use more of the product.**

For instance, Gainsight, which sells customer success software, obviously practices what they preach: Gainsight's CSMs have playbooks to, for example, reach out 30 days before renewal to ensure value is being realized, or to congratulate a customer on a milestone achieved and suggest next steps. This **relationship** can significantly improve retention – the customer sees the vendor is invested in their success. In fact, **customer-centric companies - which heavily invest in customer success - are 60% more profitable than those that aren't.**

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## Usage Monitoring & Health Scores

*“We noticed you haven’t used the Analytics module recently. Is there anything we can help you with?”*

**customer health score** (usage frequency, feature adoption, support tickets,...)

Proactive support often relies on monitoring customer usage. If a previously active user’s activity drops, or if certain features they paid for aren’t being used, that can trigger a proactive outreach: “We noticed you haven’t used the Analytics module recently – is there anything we can help you with?”

On the other side, if a user hits a usage milestone, let’s say they created their 100th project, the company might send a note suggesting an upgrade if they’re hitting limits. Many SaaS firms create a “customer health score” combining factors like **usage frequency, feature adoption, support tickets**, etc. When health score drops like low login frequency an automated process intervenes to re-engage the customer **before** they consider canceling. This approach can significantly cut down churn by catching at-risk customers early.

## Regular Check-ins & Quarterly Business Reviews

**Increasing customer retention rates by just 5% can increase profits by 25% to 95%.**

For enterprise customers, quarterly meetings are common to review the value they're getting. For smaller customers, this might be scaled via webinar. The idea is to not go silent after onboarding: continue showing interest in their progress.

All these support and engagement efforts tie back to retention metrics. **Higher retention** means customers keep paying and even expand usage. According to Bain & Company research, increasing customer retention rates by just 5% can increase profits by **25% to 95%**.

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That dramatic impact is why SaaS invests so much in customer success teams and support. **Proactive support and continuous engagement** ensure that once the customer is onboarded, they continue to derive value and feel supported.