

A photograph of a business meeting. In the foreground, a man in a blue shirt and grey cardigan is looking at a laptop. A woman in a grey blazer is smiling and looking at the laptop. In the background, another woman is holding a tablet. The scene is set in a modern office environment with a grey wall.

Your SaaS  
Customer Success  
Marketing  
Campaigns for  
Demand Gen

**SmartBug.**

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# Introduction

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As a SaaS platform marketing or sales leader, your customers' successes are directly tied to future demand generation marketing campaigns. Without success stories or happy customers to share with the market, it's nearly impossible to grow your SaaS platform user base.

When you think about your business in the context of a [flywheel](#) instead of the traditional funnel, it becomes clear which adjustments should be made to a marketing, sales, and communications strategy. Throughout this e-book, we'll focus on the critical components to demand generation efforts for SaaS companies, including the value in customer success-driven marketing, referral marketing, and launching review campaigns.



# Customer Success-Driven Marketing

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A key first step in getting your flywheel spinning is to create a seamless and enjoyable onboarding process for new customers. Whether your software takes only a few steps to set up or is a complex integration, your new customers should not feel any bumps along the way. Providing five-star service during onboarding and beyond will turn an ordinary customer into an advocate, which is an important catalyst for growth.

## Automated and Personalized Onboarding

The onboarding process is perfect to begin adding value to the customer experience. Although it's not customers' first impression of your business, it is likely an experience they'll remember and pass on to others if it exceeded their expectations. Using your customer relationship management (CRM) system's Deals, Marketing Automation Tools, and Workflows, you can also begin to automate the onboarding process.

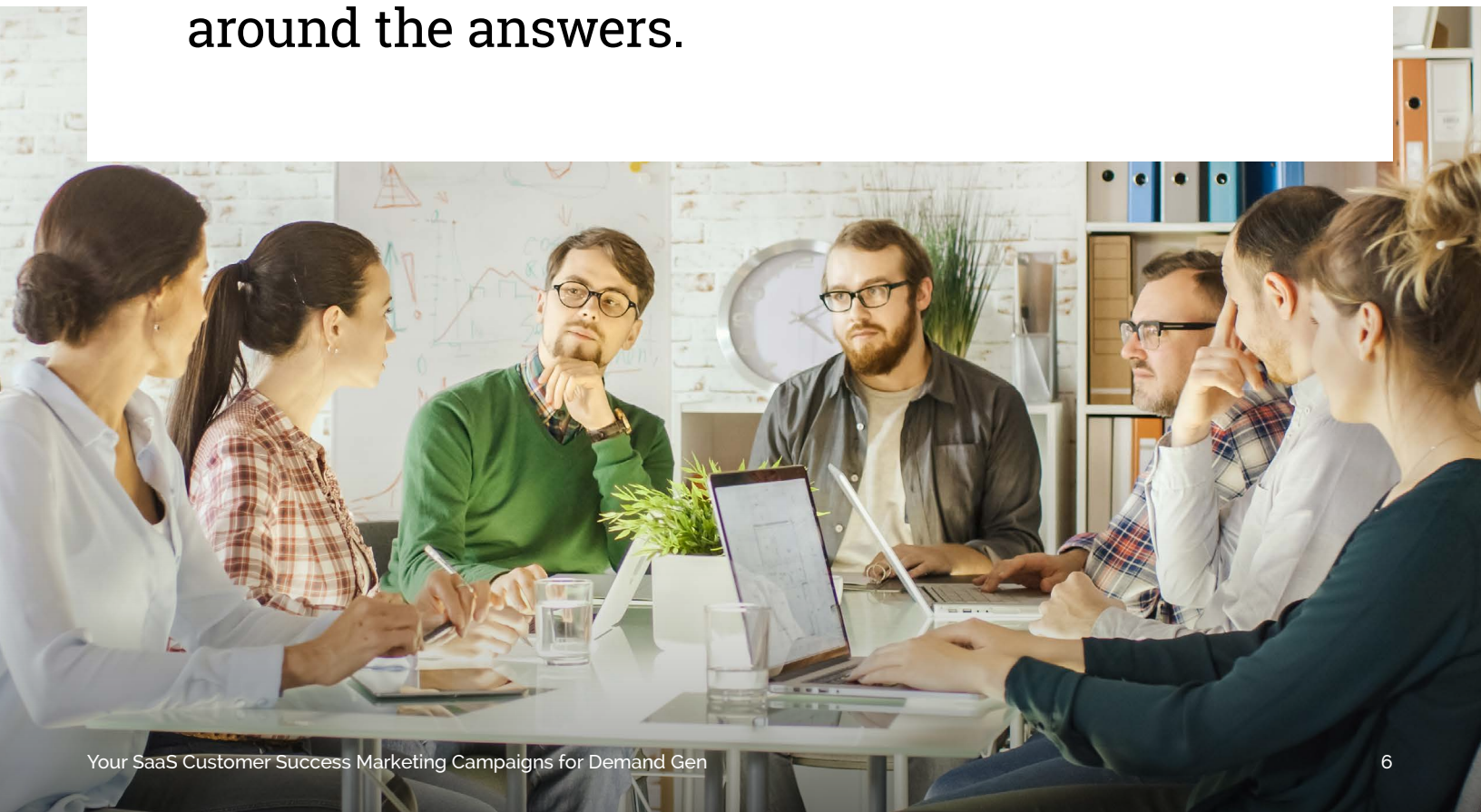
Beyond onboarding, tools such as [HubSpot's Service Hub](#) put your customers at the center of your business—instead of the output of your funnel. Every action is built around serving your customers and creating an experience that adds value. Serving your customers in this way allows for open and ongoing communication, arms them with the knowledge and resources they need to succeed, and ultimately strengthens your relationship. A strong relationship is another opportunity to delight, turning your customers into promoters of your software.

You can also leverage marketing's support along the way. Partner with your marketing team to co-create helpful onboarding documents or training videos that your new customers can access at any time. Not sure where to start? Keep a list of the most commonly asked questions your team gets during the onboarding process and create content around the answers.

The ultimate goal is to provide your new customers with the resources they need before they even ask the question.



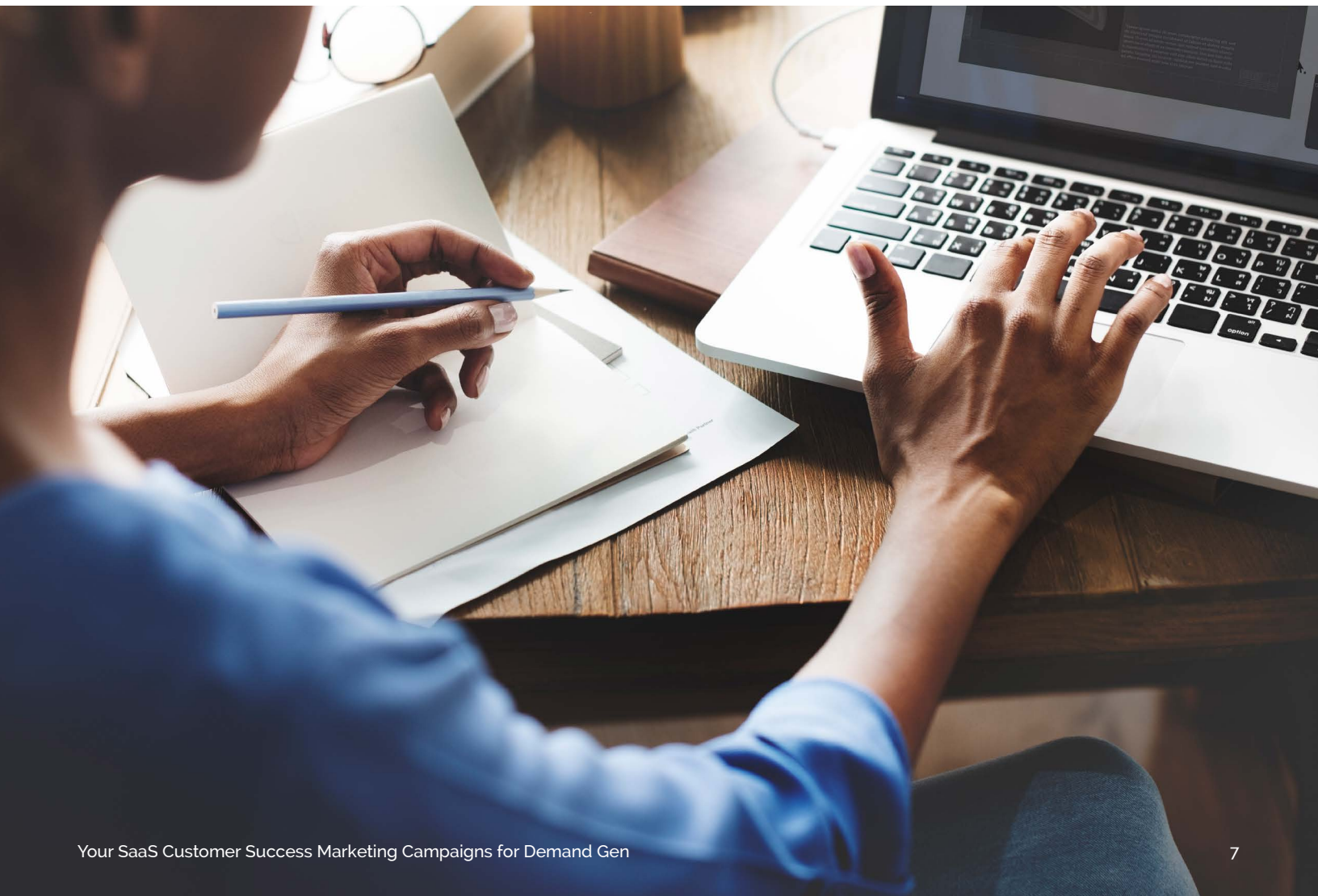
**Keep a list of the most commonly asked questions your team gets during the onboarding process and create content around the answers.**




## Continual Communication

Once your customers are onboarded and on their way, continue to add value with communication about your product. This doesn't need to be a sales-forward approach, but rather, ensure that the customer fully understands all you have to offer and is using your software to its fullest potential.

For starters, you can delight your customers by creating customer-centric blog content and encouraging them to subscribe. Then, set up automated notifications to let subscribers know when new articles are published.



A woman with dark hair, wearing a black short-sleeved top, stands behind a light-colored wooden podium. She is smiling and gesturing with her right hand as if speaking to an audience. The audience members are seen from behind, out of focus. The background is a light-colored wall with horizontal lines.

Another great way to delight is to create a series featuring your customers' most common questions or pain points. This would help your customers get in front of a problem before it happens, adding value to their experience. Taking this one step further, your team can begin to build a knowledge base for continued education with FAQs. Stock this resource full of helpful info, advanced user trainings, and even seminars.



## Customer Success Platforms and Reporting

Customer success software, such as [Gainsight](#), provides a single view of your customers using aggregate data from multiple platforms that your team may employ. This strategy gives everyone a holistic look at overall customer health. Customer success tools also put your customers at the center of everything your team does—from rallying around a customer to increasing satisfaction to spotting potential gaps before problems arise.

Usage reports are another great way to communicate the value of your solution to your customers. Sending users statistics about their platform use can inspire conversations and questions around the product, opening their eyes to features that they may be underutilizing. Usage reports may also raise a red flag for upcoming renewal if the customer isn't using your tool the way they anticipated upon purchasing it.

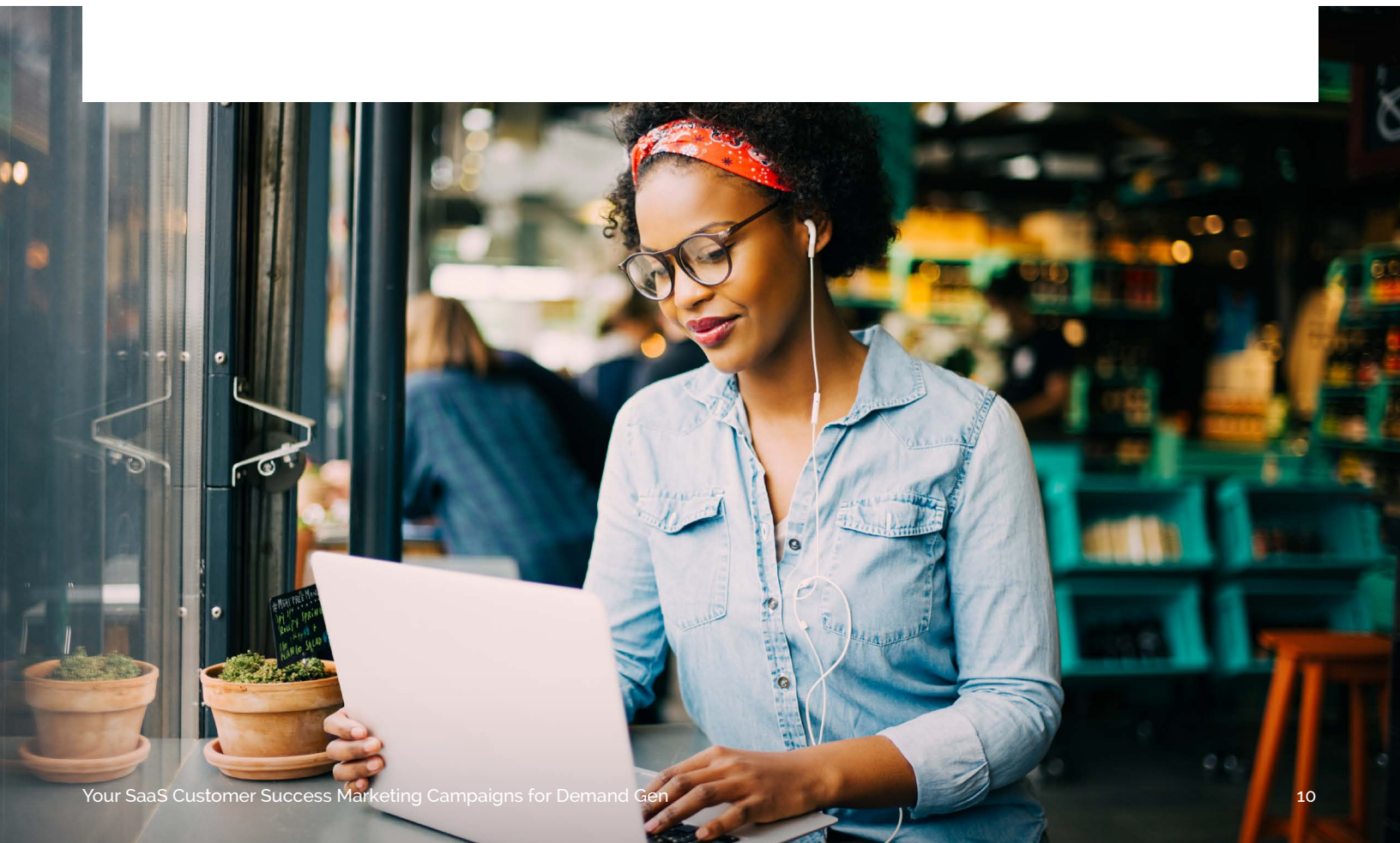


**Sending users statistics about their platform use can inspire conversations and questions around the product, opening their eyes to features that they may be underutilizing.**

# Delighting Your Customers with Non-Educational Value

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Your entire team works hard to attract and close customers—and the work shouldn't stop there. Delighting your customers can have long-term positive effects and increase ROI for your business. Although it's a strategic practice to continue creating educational content for your customers, you can also delight them with non-educational value adds. Your sales team likely built a relationship throughout the buying process, and that torch should be carried long after a customer signs on the dotted line.



**Branded swag:** Send a welcome box to your new customers filled with your company's branded swag. This not only delights your customers, but also boosts brand awareness.

**Holiday gifts or cards:** Although you don't have to send a grand gift basket around the holidays, a holiday card or small gift can go a long way to delight customers. Of course, skip this step if it feels like an obligation or if your business is not comfortable aligning with the holiday season or is concerned about alienating customers not celebrating. Instead, pick any time of year to send an unexpected gift or token to express your appreciation.

**Quarterly touches:** Your customers may remember only the name or face of who they worked with in the sales process—or not at all. Personal touches matter and show the customer that there are people behind your brand. Someone other than the account executive (AE) reaching out also makes an impression.



THANK YOU

**Remember the small things:** Leverage your CRM for keeping good notes in your contact records and reminding the AEs to reach out with a quick note—anything from wishing customers a happy birthday to saying “good luck” on their new product launch.

**Show some love on social media:** Tag your customers on social media when highlighting their successes. You can even share your customer’s content on social media with their permission, which is a great way to show your customers that you’re invested in their business and what they have to say.

People matter to your business—and a dedicated strategy that shows you’re committed to that will go a long way.



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A photograph showing three business professionals in a meeting. On the left, a man with grey hair and glasses, wearing a dark blue blazer over a light blue shirt, is looking towards the right. In the center, a man with dark hair, wearing a light blue polo shirt, is looking towards the right. On the right, a man with dark skin, wearing a light blue shirt, is gesturing with his hand as if speaking. The background is a blurred office setting with large windows.

## Cross-Selling and Upselling Campaigns

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Once a company is able to guide a prospect through the Buyer's Journey, the work doesn't just stop. And, if your organization has been missing out on key [cross-selling](#) or upselling opportunities, now is a great time to reconsider your strategy.

Increasing your value and widening the breadth of your partnership with the client doesn't have to take a super "salesy" approach. Instead, it can be a value-driven, conversational strategy that shows the client you're invested in their success and looking for opportunities to enhance the results they see from your product and/or service on an ongoing basis.

It's all about building trust and nurturing a relationship based on excellent customer experience. Once that relationship has a solid foundation, it makes the upsell a natural experience for both your sales team and the customer.



## Results-Driven Reporting

If your product or service offers usage reporting, this offers a fantastic opportunity that you can easily parlay into an upsell opportunity.

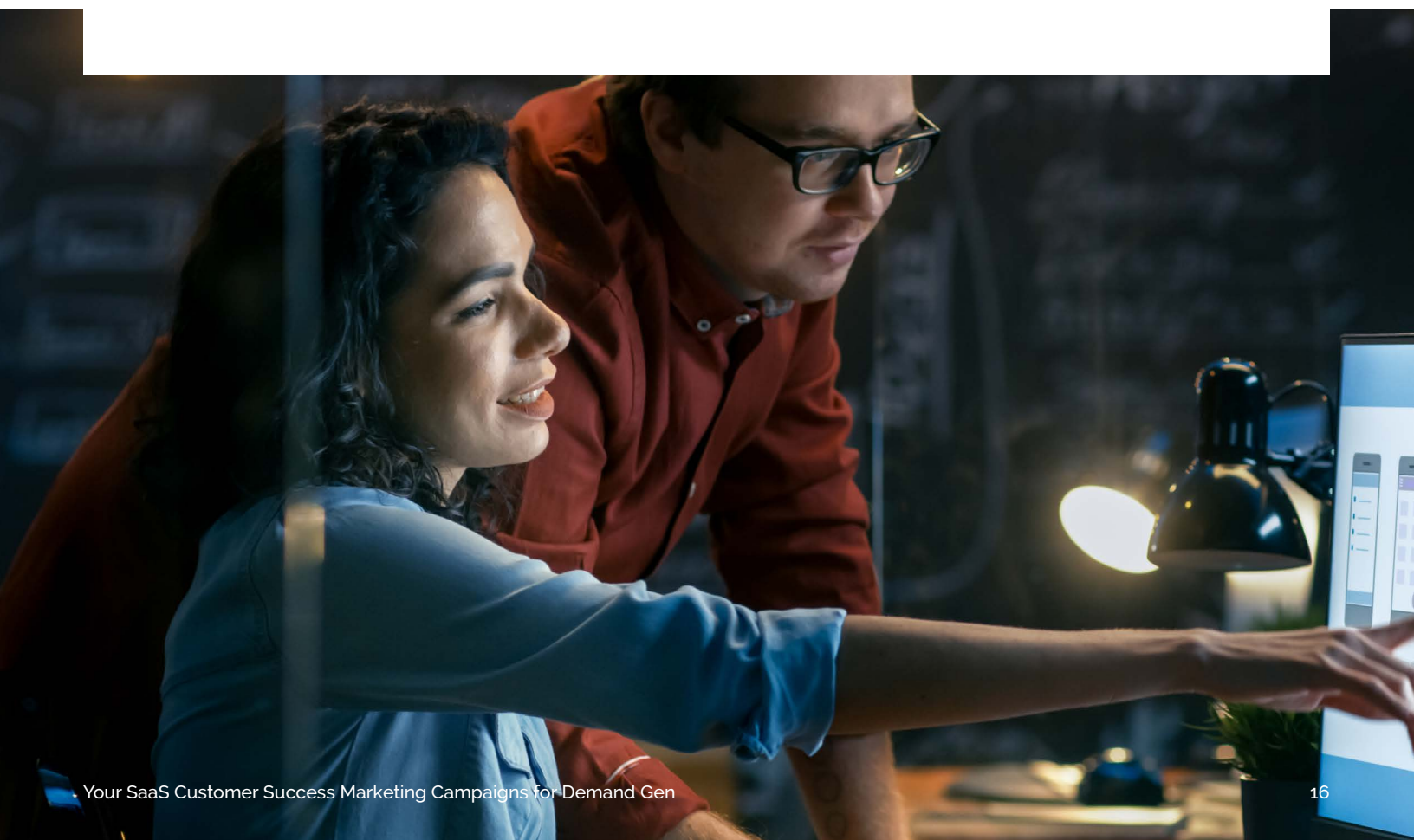
When a SaaS company shows a client a report about its tool usage, ROI, and overall time saved, opportunities emerge for the addition of modules that aren't currently in use. Instead of defaulting to a tacky sales pitch, let the data tell the story. Businesses want to work with partners that are always looking out for their best interests, which includes data-driven opportunities for business growth.

With any type of reporting, it's key to tie the data back to the results that matter most. This is why setting goals with your clients early in a relationship is critical. With many SaaS platforms, the onboarding experience typically involves asking new customers about their goals and what matters most to them. For example, if you know that efficiency optimization is a new client's main concern, reporting should be focused on this data point and related KPIs. Not only does this strategy show your customers that your organization listens, but it also shows a high level of diligence and attention to detail that will help build the critical element of customer trust.

## Saying No

Showing your customers that you have their best interests in mind is an easy win, but it also makes knowing when to say “no” a tough skill to master. Although it may not be easy in the moment to turn down a commission-based upsell opportunity, your long-term relationship with the customer is far more valuable.

For example, let's say your SaaS platform has a customer sales representative (CSR) who receives a phone call from a customer about needing more “seats” in their platform. While on the call, the CSR notices that two of the current seats are being used by employees who haven't logged into the portal in months. This presents an incredible chance to win this customer over.







### Here's a sample script for your CSR:

"Rather than adding more seats, which will increase your monthly bill, I dug into your account and noticed that there are two individuals at your organization who don't seem to be using the tool. You could reassign their seats to the new employees, or you can add more. In either case, I'd love to chat with the users who aren't using the platform to see what questions we can answer to help them get the most out of the tool!"

In a matter of minutes, the customer went from expecting to spend more money to being handed options: upgrading or reassigning seats, as well as receiving training. The value they receive from a conversation like this is priceless, and it's this type of interaction that results in positive reviews and high customer satisfaction.

## Timing

Upsell or cross-sell opportunities naturally may come to light in reporting calls, in quarterly check-ins, or through conversations with a CSR team. However, there are times for outbound correspondence, and in these cases, it's all about timing.

Every single touchpoint should have a purpose and offer some sort of value to the client. A salesperson or CSR reaching out to talk about new products or features that are available should do their homework on the client and understand their industry and goals. With this information in hand, your team will be able to customize the explanation of benefits and highlight how these features will address your clients' unique pain points. Also, when tailoring a conversation to the client, its business, and its industry, remember to be natural and authentic.

Additionally, keep an eye on any news about your clients and their industries so you can stay ahead of changes that may affect how they interact with your SaaS platform. For example, if a client is acquiring or merging with another business, it's a perfect time to reach out and let the client know you've been following the news and want to see how you can help get any new team members up to speed. An easy way to stay on top of this is to subscribe to your client's blog or newsletter or set up [Google Alerts](#) to email you as news pops up.

# Gathering Feedback

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Finally, having a mechanism to gather feedback for your SaaS product is an excellent way to cultivate conversations and gather ideas for further product development and enhancements. Whether on a forum, Google Sheet, or [shared Trello board](#), there's a variety of ways to get the conversation going. If you can give users the chance to "upvote" certain ideas, you can begin to identify where the major opportunities are that the market is demanding.

Gathering feedback can work wonders for helping your organization shape its product roadmap, not to mention your content development strategy. For example, if you're seeing a lot of questions about how your product integrates with another popular tool or how to export data from your platform, write a consideration stage blog article featuring answers and explanations. It's likely that other users also have these questions—and even more likely that other potential prospects have this question and will look to Google for the answers.



**It's even more likely that other potential prospects have this question and will look to Google for the answers.**



## Review Campaigns

Another excellent way to promote your product and share your reputation with the marketplace is through review campaigns. It's important to know what signals to look for in identifying an ideal time to ask customers for reviews of your product. If a customer recently upgraded their product, added more seats, or had a positive interaction with a CSR, these are excellent follow-up opportunities in which you can request a review.

Other organizations incentivize their users for providing feedback, such as [G2 Crowd](#), that offers Starbucks gift cards and other rewards for completing reviews. Consider asking your customers to review your SaaS platform on a third-party site, such as [Capterra](#), that requires reviewers to sign in through LinkedIn, making these reviews more trustworthy than a block of copy on your website or in an email.

## Referral Campaigns

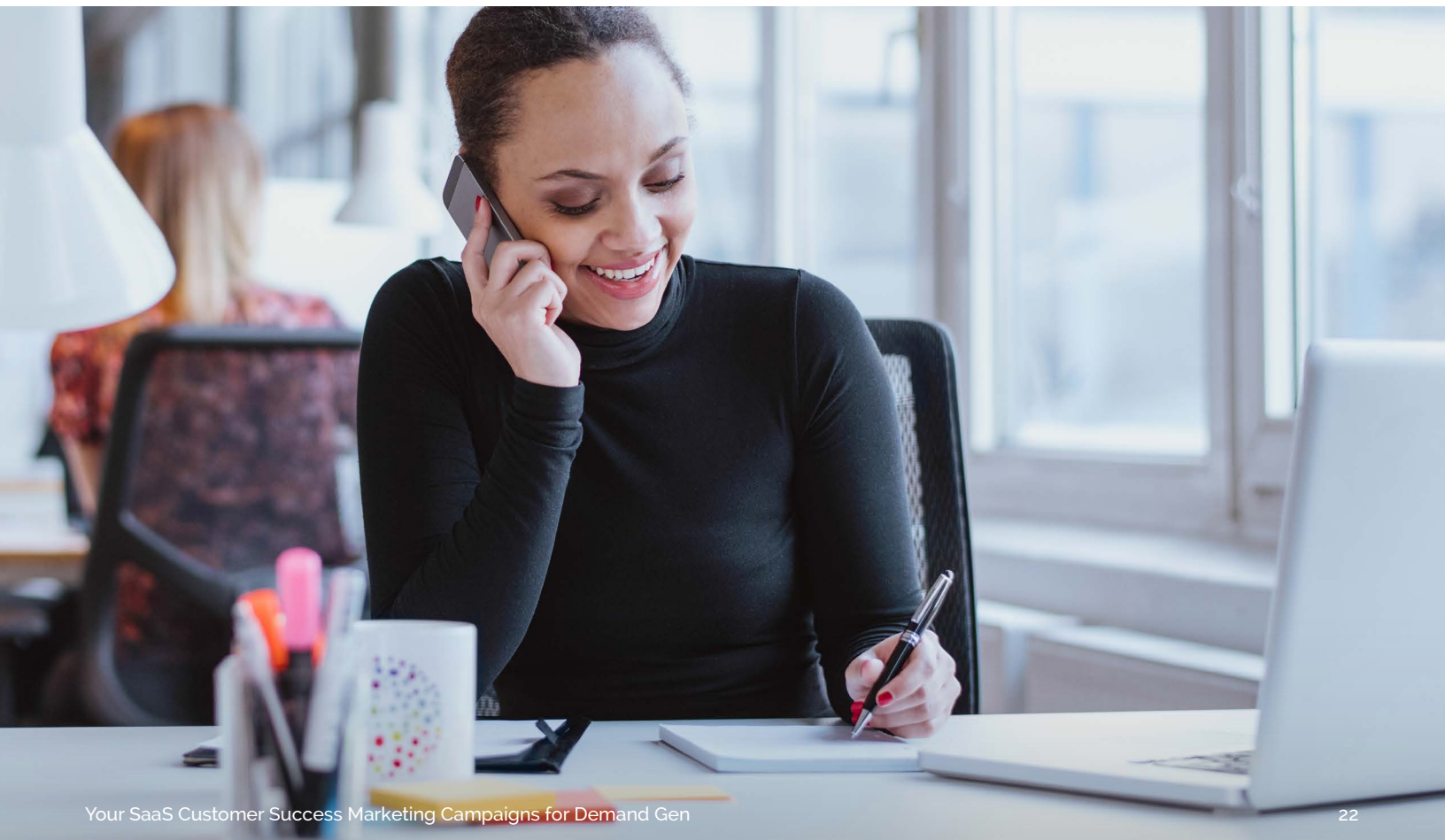
Additionally, there are several platforms available that make soliciting reviews significantly more efficient for your users, including [Grade.us](#) and [GatherUp](#) (formerly GetFiveStars). Tools such as these can help automate the review process and point users to the ideal review platforms specified by your organization (e.g., similar to how doctors can push patients to Healthgrades). Maintaining a mindset focused on lead generation will help your team understand the importance of having five-star reviews to point to when engaging with a prospect.

Referral campaigns are a growing opportunity for SaaS companies, and if you decide to go down this path, it's important to document the how, why, and what.

- **How** can your customers refer people (e.g., what's the process/mechanism)?
- **Why** should your customer refer people from their network?
- **What** does the customer get in return for their referral?

A referral marketing campaign can be manually set up using custom properties in your desired CRM tool, and this can then be tied back into your marketing automation system.

Or, consider investing in a more enterprise-level solution, such as [Ambassador](#), which offers tons of added value, including automated rewards payout and an easy-to-access portal for anyone who joins your referral program. The portal even lets users track their payouts, traffic from their social media shares, and more. Going with such a solution allows your SaaS platform to scale this as a true lead generation offering and adds a unique element to your marketing repertoire.





# Getting Started

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As a SaaS company, your customer's success stories can translate into huge wins for your organization. Keeping critical components in mind—such as [upselling](#), [cross-selling](#), reviews, and [referral](#) campaigns—can keep your team solution-oriented and customer-centric. As [HubSpot](#) says, “With the flywheel, you use the momentum of your happy customers to drive referrals and repeat sales. Basically, your business keeps spinning.”

## Have a question? Curious how we can help grow your business?

Get the conversation started and let's talk about your organization, your goals, and how SmartBug™ can help you achieve them.

Let's Talk

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[www.smartbugmedia.com](http://www.smartbugmedia.com)

