The Future is Here, Is Your Lifecycle Team Ready?
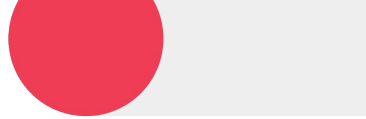
Dillon Nuanes

Director of Retention & Lifecycle
ClickUp

Agenda

01	Challenges and opportunities
02	Forest and the trees
03	Lifecycle & CX
04	Foundational Lifecycle
05	North star

Challenges Opportunities

CHALLENGE

Customer acquisition is expensive

CAC payback time to recoup customer acquisition costs.

MEDIAN CAC PAYBACK PERIOD 2023 VS. 2022

■ 2022 ■ 2023

	<$1M ARR	$1-5M ARR	$5-20M ARR	$20-50M ARR	>$50M ARR
2022	7	11	14	17	16
2023	8	11	14	22	22

Source: Openview: 2023 SaaS Benchmarks Report

OPPORTUNITY

Owned channels

Email, product, and social are "free"

Land and maintain

Retention is the only game in town

TOP QUARTILE NET DOLLAR RETENTION 2023 VS. 2022

■ 2022 ■ 2023

	<$1M ARR	$1-5M ARR	$5-20M ARR	$20-50M ARR	>$50M ARR
2022	103%	119%	121%	117%	126%
2023	120%	107%	110%	106%	109%

Source: Openview: 2023 SaaS Benchmarks Report
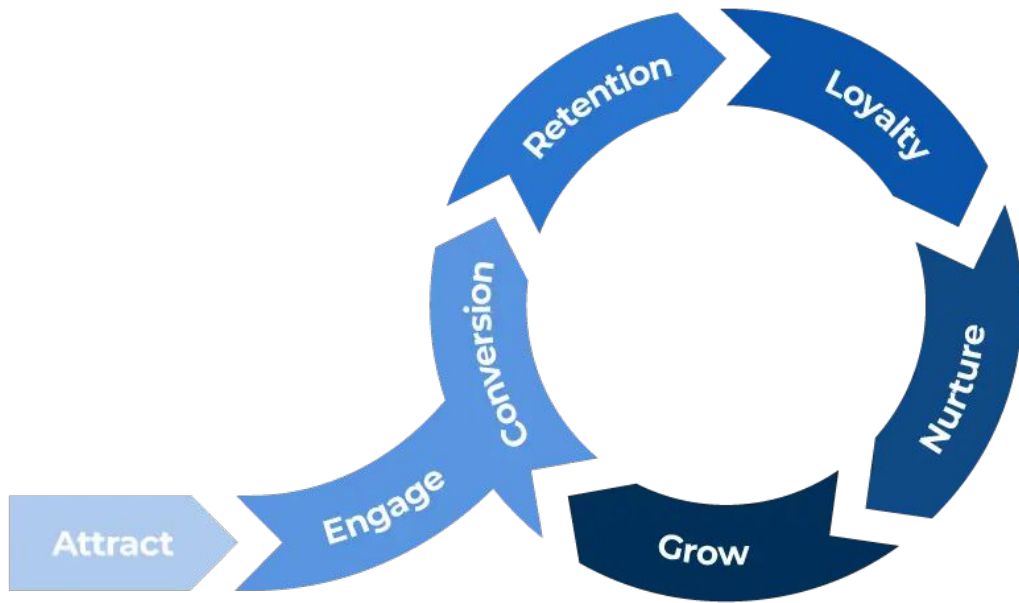
OPPORTUNITY

Customer journey

Every stage of journey is important

CHALLENGE

AI
Automation
Personalization

These are have become table stakes

The Generative AI Market Map v3

A work in progress

OPPORTUNITY

Domain expertise

Leverage expertise and knowledge

Don't miss forest for the trees

Channels as trees

Consider the experience

Focus on solutions

Marketing

CX

Lifecycle

Product
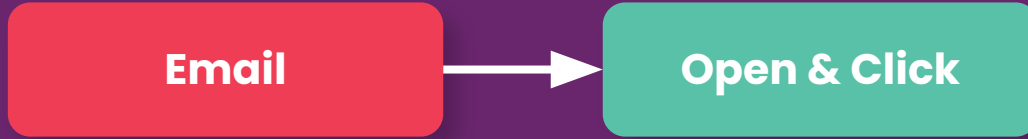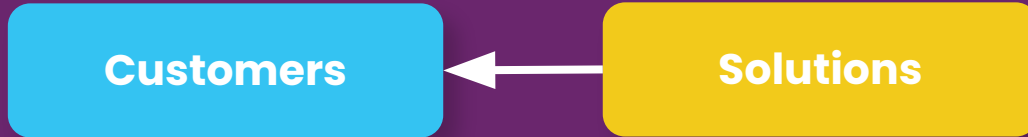
Sales
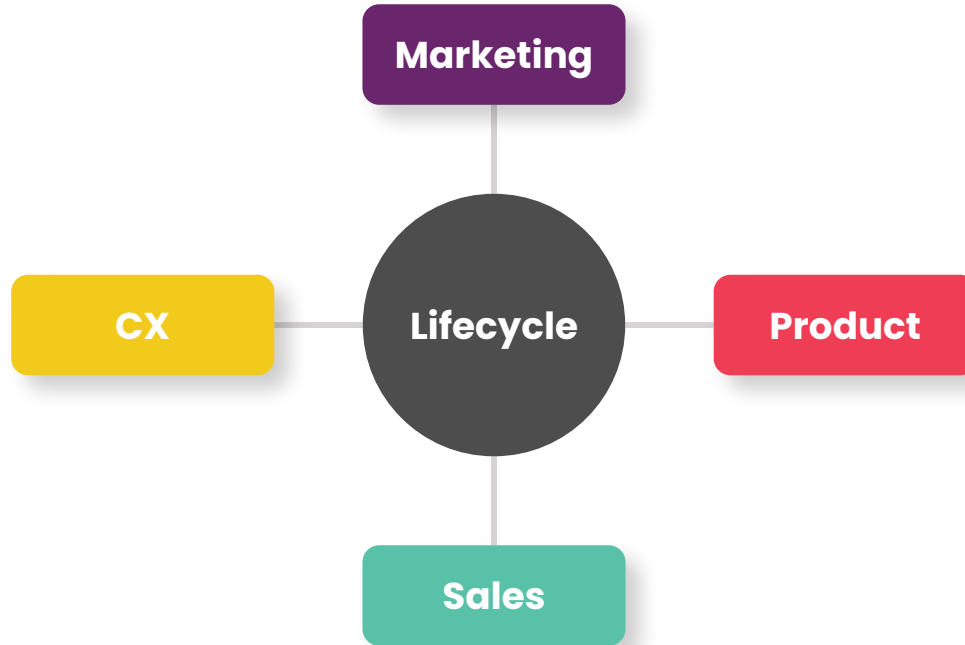
Lifecycle & CX

Engage your CX team

Customer Support

Solving tickets
Reactive

→

Tickets solved / time
COGs

Customer Success

Customer meetings
Semi-reactive

→

Meetings / time
Customer retention

Less customer tickets
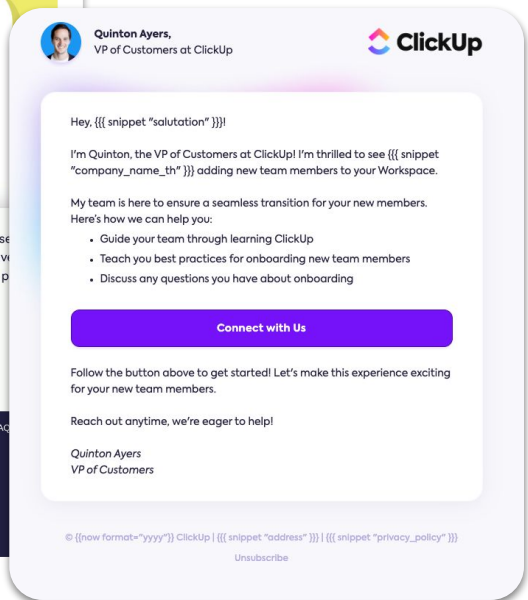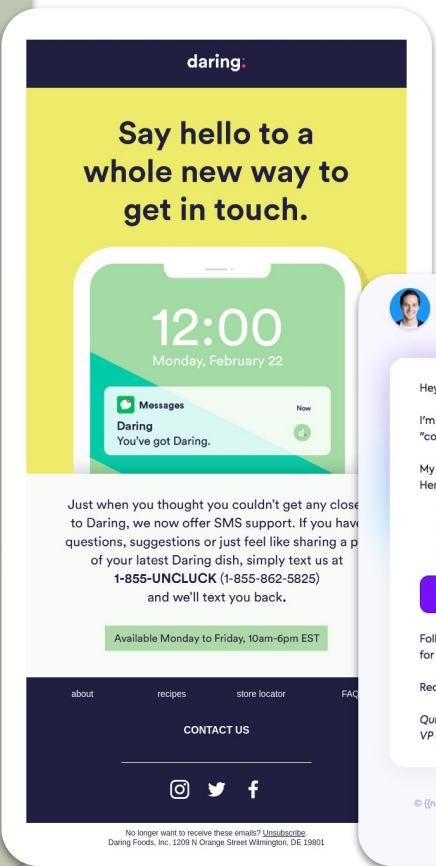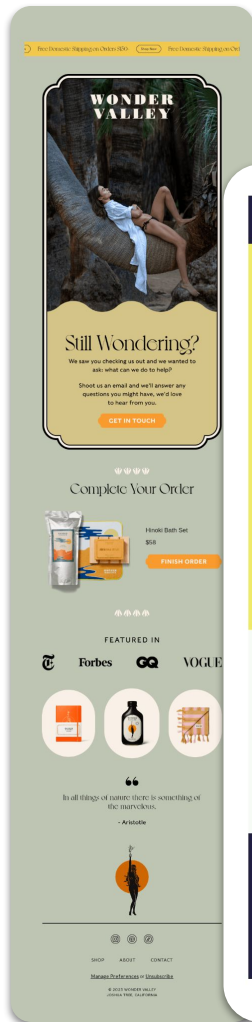# Better onboarding

Healthy customer principle

Cheaper and easier to make a new customer healthy than save an at-risk customer

23%

Decrease in customer ticket when onboarding is successful

Extend support before the customer hits a problem

Proactively **use the tools of support** and embed them in the journeys you create

WONDER VALLEY

Still Wondering?

We saw you checking us out and we wanted to ask: what can we do to help?

Shoot us an email and we'll answer any questions you might have, and we'd love to hear from you.

GET IN TOUCH

Complete Your Order

Hinoki Bath Set
$58

FINISH ORDER

FEATURED IN

The New York Times · Forbes · GQ · VOGUE

"In all things of nature there is something of the marvelous."
- Aristotle

SHOP   ABOUT   CONTACT

Manage Preferences or Unsubscribe

© 2023 WONDER VALLEY
JOSHUA TREE, CALIFORNIA

---

daring.

Say hello to a whole new way to get in touch.

12:00
Monday, February 22

Messages   Now
Daring
You've got Daring.

Just when you thought you couldn't get any closer to Daring, we now offer SMS support. If you have questions, suggestions or just feel like sharing a pic of your latest Daring dish, simply text us at
1-855-UNCLUCK (1-855-862-5825)
and we'll text you back.

Available Monday to Friday, 10am-6pm EST

about   recipes   store locator   FAQ

CONTACT US

Quinton Ayers,
VP of Customers at ClickUp

ClickUp

Hey, {{{ snippet "salutation" }}}!

I'm Quinton, the VP of Customers at ClickUp! I'm thrilled to see {{{ snippet "company_name_th" }}} adding new team members to your Workspace.

My team is here to ensure a seamless transition for your new members. Here's how we can help you:

- Guide your team through learning ClickUp
- Teach you best practices for onboarding new team members
- Discuss any questions you have about onboarding

Connect with Us

Follow the button above to get started! Let's make this experience exciting for your new team members.

Reach out anytime, we're eager to help!

Quinton Ayers
VP of Customers

50%

Increase in net dollar retention

Foundational Lifecycle

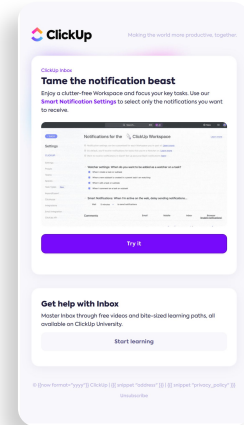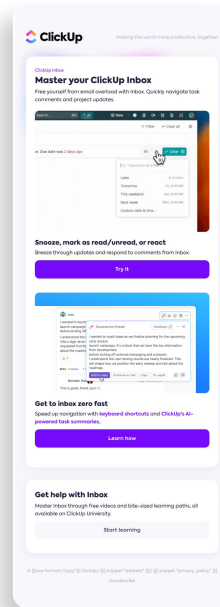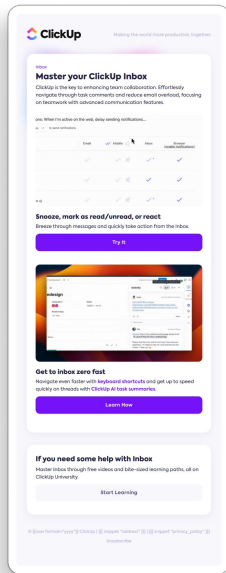# Adoption

Explain your product and show value
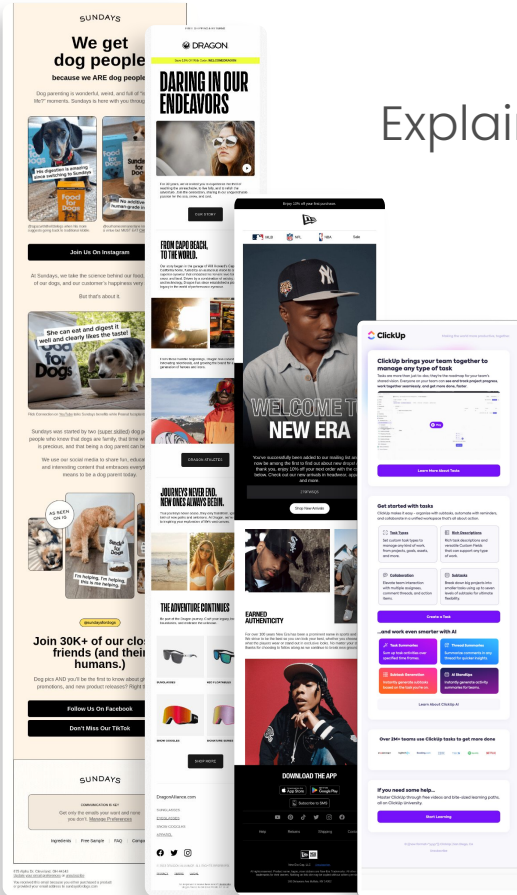
30%

Increase in product stickiness

Retention

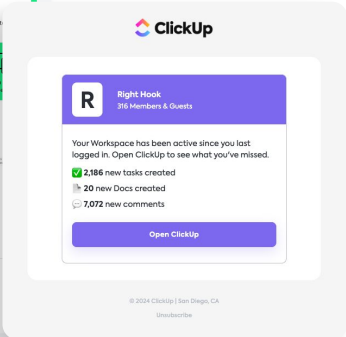Use data and automation to create deeper customer experiences

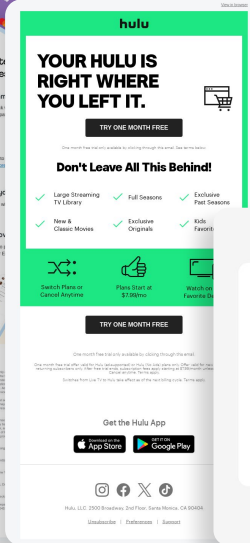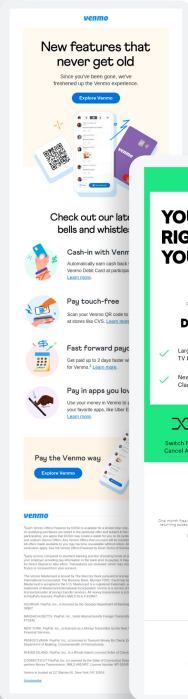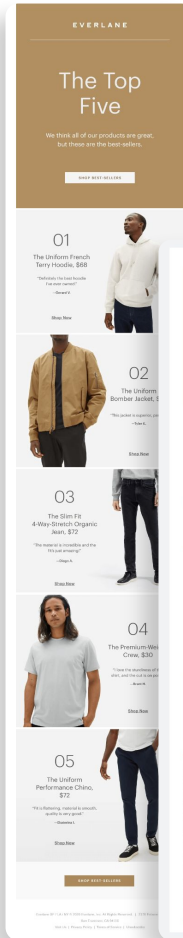# Reactivation

Simple and scalable programs

5%

Increase in reactivation rate

North Star

Net Dollar Retention

NDR = Beginning ARR + Expansion ARR - Churn & Contraction ARR / Beginning ARR

Good NDR & Bad NDR

>100%

Good NDR
Retaining & Expanding Customers

<100%

Bad NDR
Churning & Contracting Customers

Good NDR & Bad NDR

Customer Creation Month	M0	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
Jan 2023	100%	101%	102%	103%	104%	105%	106%	107%	108%	109%	110%	111%	112%
Feb 2023	100%	102%	104%	106%	108%	110%	112%	114%	116%	118%	120%	122%	
Mar 2023	100%	103%	106%	109%	112%	115%	118%	121%	124%	127%	130%		
Apr 2023	100%	104%	108%	112%	116%	120%	124%	128%	132%	136%			
May 2023	100%	105%	110%	115%	120%	125%	130%	135%	140%				
Jun 2023	100%	106%	112%	118%	124%	130%	136%	142%					
Jul 2023	100%	107%	114%	121%	128%	135%	142%						
Aug 2023	100%	108%	116%	124%	132%	140%							
Sep 2023	100%	109%	118%	127%	136%								
Oct 2023	100%	110%	120%	130%									
Nov 2023	100%	111%	122%										
Dec 2023	100%	112%											

Customer Creation Month	M0	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
Jan 2023	100%	99%	98%	97%	96%	95%	94%	93%	92%	91%	90%	89%	88%
Feb 2023	100%	98%	96%	94%	92%	90%	88%	86%	84%	82%	80%	78%	
Mar 2023	100%	97%	94%	91%	88%	85%	82%	79%	76%	73%	70%		
Apr 2023	100%	96%	92%	88%	84%	80%	76%	72%	68%	64%			
May 2023	100%	95%	90%	85%	80%	75%	70%	65%	60%				
Jun 2023	100%	94%	88%	82%	76%	70%	64%	58%					
Jul 2023	100%	93%	86%	79%	72%	65%	58%						
Aug 2023	100%	92%	84%	76%	68%	60%							
Sep 2023	100%	91%	82%	73%	64%								
Oct 2023	100%	90%	80%	70%									
Nov 2023	100%	89%	78%										
Dec 2023	100%	88%											

Good NDR
Revenue increases over time

Bad NDR
Revenue decreases over time

Wrapping Up

1

Understand the Opportunity
Utilize the challenges

2

Outputs & Solutions
Focus on experiences

3

CX
Build this partnership

4

Foundational Lifecycle
Do these things well

Thank you!

ITERABLE

Follow us!

Not everyone is a leader, be a follower.
For marketing tips, tricks, and updates,
scan to follow us on all social platforms.