

# The Strategic Role of Customer Success in Ad Tech: Driving Platform Engagement, Retention and Revenue Growth

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## ABSTRACT

In today's rapidly evolving ad tech landscape, customer success has become a critical driver of platform adoption, retention and growth. This paper examines how customer success leaders in the ad tech industry can enhance platform success through strategic initiatives like tailored customer education, cross-departmental collaboration, upselling and cross-selling, and proactive client engagement. Additionally, we explore the role of customer success metrics, scalable processes, client advocacy programs and loyalty programs, providing a comprehensive guide for customer success, operations, and account management leaders.

**Keywords:** Customer success, ad tech, platform adoption, retention, upselling, cross-selling, client satisfaction, customer engagement, scalability, loyalty programs, customer advocacy, feedback loops, KPIs, campaign performance.

## 1. Introduction

The ad tech industry faces continuous changes driven by technology, evolving client needs and stringent data privacy regulations. For platforms to thrive, customer success teams must go beyond reactive support and become strategic partners to their clients, helping them achieve long-term success. This paper aims to present a detailed framework that customer success leaders can use to build scalable, effective strategies focused on platform engagement, retention and revenue growth.

## 2. The Role of Customer Success in Ad Tech Platform Adoption and Engagement

Customer success plays a foundational role in ensuring that ad tech platforms are fully adopted by clients, especially given the complexity and sophistication of these systems. To increase engagement and adoption, customer success teams need to focus on three main elements:

- **Client Education:** Continuous education is crucial in ad tech. This involves offering ongoing training sessions, webinars, and creating a self-service knowledge base.

Personalized training programs that cater to the specific needs of a client's team (e.g. media buyers, campaign managers) help ensure they can use the platform effectively.

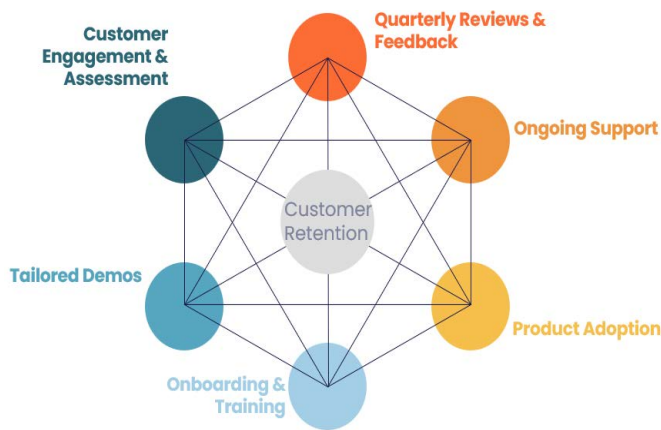
- **Onboarding Process:** The first few months are crucial in the customer lifecycle. A well-structured onboarding process that breaks down platform features into digestible, actionable steps helps ease the client into using the platform. Customer success teams should monitor early usage metrics and provide clients with support if they experience challenges.
- **Feature Adoption:** The key to driving engagement is ensuring that customers make full use of the platform's capabilities. Regularly introducing new features during platform demonstrations and showing clients how to use them effectively can lead to increased client satisfaction and retention.

## 3. Aligning Platform Demos with Customer Campaign Objectives

A generic demo often fails to address specific client needs, making it less effective in driving value. Customer success

teams should strive to tailor demos around the individual goals of the client’s marketing or advertising campaigns. This means:

- **Understanding Client Objectives:** Before presenting the demo, the customer success team should understand the client’s campaign objectives, such as audience targeting, media spend or specific ad formats they want to leverage.
- **Tailored Demonstrations:** Tailoring the demo to showcase features that align with those objectives improves the client’s perception of the platform. For example, if the client is focused on increasing mobile ad spend, the demo should highlight mobile advertising features, real-time bidding options or mobile analytics.
- **Creating a Feedback Loop:** After the demo, it’s crucial to capture client feedback. Understanding which features resonated most can help refine future demos and ensure the platform evolves based on customer needs.



**Figure 1:** Customer success onboarding process leading to retention.

#### 4. Best Practices for Driving Customer Retention and Increasing Renewals

Customer retention is a key indicator of the success of a customer success team. By implementing proactive engagement practices and keeping clients invested in the platform, retention rates can significantly improve:

- **Proactive Communication:** Regular check-ins with clients can help surface issues before they become major problems. Monthly or quarterly business reviews (QBRs) help evaluate how well the platform is performing against the client’s objectives.
- **Demonstrating Value:** Renewal conversations should start early, and the focus should be on demonstrating how the platform has helped the client meet or exceed their campaign goals. This can be done through data-driven reports that show improved campaign performance.
- **Incentivizing Long-Term Renewals:** Offering incentives such as discounts or additional features for clients who sign multi-year contracts can also boost retention.

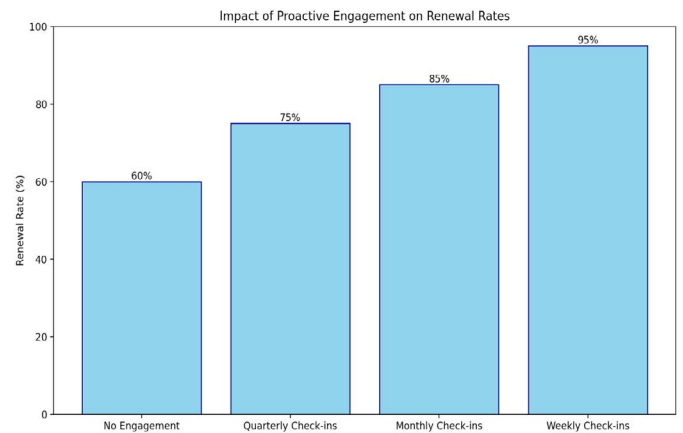
#### 5. Techniques for Upselling and Cross-Selling

Upselling and cross-selling should be an integral part of a customer success team’s strategy. These techniques can help clients maximize their use of the platform while also contributing to revenue growth for the company:

- **Identifying Opportunities:** Customer success teams

should use platform data and analytics to identify areas where clients could benefit from additional features. For example, if a client is focused on mobile ads but hasn’t yet explored cross-device targeting, that’s an opportunity to introduce them to that feature.

- **Presenting Value:** When upselling or cross-selling, the focus should be on the additional value that the client will receive. This could be in terms of better campaign performance, increased ROI or access to new audience segments.
- **Timing Matters:** Upselling or cross-selling shouldn’t be rushed. The best time to introduce these opportunities is once the client has seen tangible results from their current campaigns. During quarterly reviews or renewal discussions is an ideal time.



**Figure 2:** A bar chart illustrating the impact of proactive engagement on renewal rates.

#### 6. Identifying Campaigns for Case Studies to Drive Engagement and Thought Leadership

Case studies serve as powerful tools for not only showcasing success stories but also establishing credibility and thought leadership within the ad tech industry:

- **Selecting the Right Campaigns:** Not all campaigns are case-study worthy. Customer success teams should identify those that have exceeded expectations or used innovative strategies to meet client objectives.
- **Collaborating with Clients:** Getting client approval and collaboration on case studies is essential. Offering co-marketing opportunities can help secure client participation.
- **Leveraging Case Studies for Growth:** Case studies can be used to showcase the platform’s capabilities to prospective clients, helping to close deals faster. Additionally, they can be leveraged in internal training programs for the sales and marketing teams.

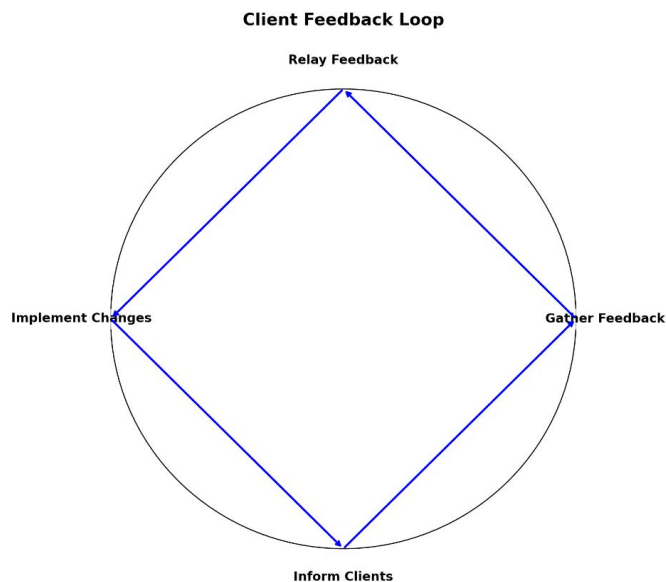
#### 7. Feedback Loops: Relaying Customer Insights to Product and Technology Teams

Customer feedback is crucial in ad tech, where platforms need to evolve constantly to meet client needs. Customer success teams are uniquely positioned to collect this feedback and relay it to product and technology teams:

- **Structured Feedback Collection:** Quarterly feedback surveys, Net Promoter Score (NPS) tracking and direct

interviews with clients can provide actionable insights.

- **Prioritizing Feedback:** Not all feedback can be acted on immediately. Customer success teams should categorize feedback into short-term fixes, medium-term updates and long-term product development needs.
- **Closing the Loop:** It's crucial to communicate to clients how their feedback has been used. Showing that their input has influenced platform updates helps build trust and customer loyalty.



**Figure 3:** This diagram illustrates the cyclical process of the client feedback loop.

## 8. Customer Success Metrics

Effective customer success programs are built on measurable success. Below are several key metrics that customer success leaders should track to gauge the effectiveness of their initiatives:

- **Renewal Rates:** Renewal rates measure the percentage of customers that renew their subscriptions or contracts after the initial period. A high renewal rate indicates that customers find consistent value in the platform, making it an essential measure of customer retention.
- **Upsell and Cross-Sell Rates:** These rates help quantify the revenue generated through upselling and cross-selling additional features or products to existing customers. It demonstrates how well the customer success team is identifying new opportunities for growth within the client base.
- **Customer Satisfaction Scores (CSAT):** CSAT is a metric that directly measures how satisfied customers are with their overall experience. This can be gathered through post-interaction surveys and maintaining a high CSAT score indicates that the customer success team is effectively meeting client needs.
- **Net Promoter Score (NPS):** NPS is a widely used metric that measures client loyalty by asking how likely they are to recommend the platform to others. A high NPS score indicates strong client satisfaction and engagement.
- **Time-to-Value (TTV):** TTV is the period it takes for a customer to see tangible value after adopting the platform. Reducing TTV helps ensure that clients remain engaged and are more likely to renew and expand their usage.

- **Churn Rate:** Churn rate refers to the percentage of clients who do not renew or leave the platform. Tracking this metric helps customer success teams identify issues early and work on retention strategies.

By focusing on these metrics, customer success leaders can ensure that their teams are driving meaningful results and fostering long-term client relationships.

## 9. Scalable Processes

In the fast-paced ad tech environment, scaling customer success processes is essential to manage an expanding client base. Leaders must consider how to grow their teams, implement automation tools and build scalable processes.

- **Automation:** Leveraging automation tools such as AI-powered chatbots, automated onboarding, and self-serve help centers can enable customer success teams to provide consistent support even as the client base grows. For example, using predictive analytics to track customer engagement can alert teams to potential churn risks before they escalate.
- **Specialized Teams:** As the organization grows, customer success leaders should consider building specialized teams focusing on key verticals or areas such as onboarding, renewals and upselling. This ensures that every stage of the customer lifecycle is expertly handled.
- **Standardized Processes:** Establishing standard operating procedures for recurring tasks such as onboarding, performance reviews and renewal negotiations ensures that every client receives consistent, high-quality service.

## 10. Client Advocacy Programs

Satisfied clients can be powerful advocates for your platform. Building a formalized client advocacy program not only strengthens client relationships but also drives new business through referrals and word-of-mouth marketing.

- **Referral Programs:** Implementing a structured referral program can incentivize satisfied clients to recommend the platform to their peers. Offering rewards or discounts for successful referrals can turn happy customers into growth drivers for the business.
- **Product Advisory Boards:** Creating product advisory boards composed of key clients allows them to provide feedback on future product developments. This strengthens the relationship between the customer and the company, and helps ensure that product enhancements align with customer needs.
- **Co-Marketing Initiatives:** Working with top clients to co-create webinars, white papers, or case studies allows for co-branding opportunities, increasing both the client's and the platform's visibility in the industry.

## 11. Partner Program: Building a Loyalty Program

Creating a loyalty or partner program for clients can be an effective way to retain customers, increase their lifetime value and deepen engagement. This can also position the platform as an essential part of a client's long-term strategy.

- **Tiered Loyalty Programs:** Offering a tiered loyalty program where clients can earn points or receive rewards based on their engagement with the platform incentivizes

continued use. For example, clients could earn points for every campaign launched or for renewing their contract, which could be redeemed for discounts or exclusive access to new features.

- **Exclusive Features:** Providing exclusive access to beta products, priority support, or advanced analytics tools can differentiate loyal customers from others, making them feel valued and increasing their commitment to the platform.
- **Joint Ventures with Strategic Partners:** Partnering with other companies in the ad tech ecosystem (e.g., data providers, insights, ad exchanges, measurement partners) allows clients to benefit from an integrated solution, enhancing their overall experience with the platform.

## 12. Conclusion

Customer success has become a critical driver of platform success in the ad tech industry. By focusing on metrics like renewal rates, upsell opportunities and customer satisfaction and by implementing scalable processes, loyalty programs and client advocacy initiatives, customer success teams can move from being reactive support departments to proactive growth engines. Ad tech leaders should use the strategies outlined in this paper to build high-impact customer success programs that foster long-term client relationships, optimize platform performance and drive revenue growth.

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