



**94%** Increase in  
Customer Coverage for  
NPS® and CSAT

Monthly Analytics Updates

**12x** Increase in Frequency  
Compared to annual surveys

Continuous Driver Analytics for

**900+** Operational Metrics  
Including Relative Impact on NPS® and CSAT

## SUCCESS STORIES

Conga Uses Customer AI to  
Improve CX Analytics and  
Drive B2B SaaS Retention

# conga®

Conga is a B2B SaaS company that walks the talk. Created through the merger of two already successful large scale companies, Conga faced the challenge of unifying products, team members and customers in a single vision. A single value proposition – simplifying revenue lifecycle complexity – provided a product vision, but leadership recognized the need for more. So “the Conga Way” was developed as a set of core values to rally both internal and external stakeholders.

“Embrace an Entrepreneurial Spirit” and “Achieve Together” are two pillars of the Conga Way, but it’s “Champion the Customer” that created an imperative for Conga leadership to seek leadership through customer experience analytics. Conga’s multiple product lines and business segments, together with a range of account revenues ranging from large enterprise multi million dollar deals to a long tail of thousands of smaller relationships, demanded sophistication and detail. Customer AI proved the ideal set of analytics to meet such demands.

## Efficient Growth

The business imperative at Conga is to achieve outstanding growth, but with efficient use of resources. A customer-led growth strategy means that Net Recurring Revenue is a critical financial metric, but Conga’s ambitions go beyond just retaining customers. To be successful, they recognized the need to identify both risk and opportunity within their customer base, prioritize resource allocation to maximize returns and constantly refine their operating model. To be cost efficient, they couldn’t be reacting to surprises in their customer base, they needed to see around corners; anticipate the inevitable challenges in managing such a significant customer base and take the best possible actions early enough to make a difference. In short, they saw the opportunity to tie predictive customer analytics to effective team execution and create a data driven, efficient approach to maximizing growth with limited resources.

## Summary

Using Customer AI, Conga was able to build a monthly data-driven view of more than 10,000 accounts, showing NPS®, CSAT and the relative impact of the underlying operational metrics that are driving them.

Conga is using Customer AI to prioritize customer facing resources more efficiently and create prescriptive strategies to focus them on the parts of the experience where they’re needed.

Conga has already expanded its use of Customer AI to include predictive Propensity to Renew analytics that target at-risk customers and spot opportunities for expansion that previously went undiscovered.

Leveraging Customer AI for its detailed operational driver analysis, Conga is expanding its program even further to target continuous improvement across the operation places like sale, product development and customer support.



“... We have always championed customer satisfaction and success. We firmly believe that providing exceptional customer experiences and value generation is key to building long-term relationships and driving business growth. ...we’ve faced challenges when it comes to gaining comprehensive insights into our customers' journeys and understanding their needs and preferences at every stage.”

**Chris Bishop**  
Chief Customer Officer

## Surveys Alone Fall Short

Conga realized quickly that traditional approaches to customer experience measurement would fall far short of their requirements. Jim O'Brien, Senior Director VOC brought years of experience in survey based CX measurement with him to the job, but was quick to see the potential for Customer AI. “As is typical for businesses today, we were using a survey platform to collect customer attitudes. This left us with feedback from just 6% of customers once per year. What’s worse, there was really no way to control our survey sample and be sure that it contained a representative mix of our customers” said O'Brien.”

“By implementing Customer AI Software from OCX Cognition, we now generate accurate scores for 100 percent of our customers and refresh them with new operational data inputs every month.”

## Complete CX Analytics with Customer AI

“By leveraging AI, the platform enables us to gain deep insights into our customers' behaviors, preferences, and sentiments”, says Bishop, “we embrace metrics like Net Promoter Score (NPS), Customer Satisfaction (CSAT), and Propensity to Renew, but we now refresh these metrics monthly and connect them directly with underlying operational KPIs we track throughout the enterprise. Because the OCX Cognition solution scores every customer continuously, we are able garner insights on entire customer journey and connect customer attitudes and behavior to operational data from various systems of engagement throughout our enterprise.” Now in it’s second year of use, Conga’s Customer AI software has already generated data sets many hundreds of times larger than their survey program could achieve, with more accurate NPS results and an order of magnitude greater depth in analytics.

## Predicting Churn, Expansion, and More

Now that every account is scored, precious resources can be allocated exactly where they are needed to either mitigate the risk of loss or create upsell opportunities. O'Brien: “By leveraging the platform’s AI capabilities, we can segment our customer base effectively and deliver targeted messaging, offers, and support. This level of personalization has significantly strengthened our customer relationships, leading to increased loyalty, satisfaction, and ultimately, higher retention rates.” And they are just getting started. Multiple functions across the enterprise, from sales to support and customer success, are bringing Customer AI data into their decision processes, learning where there are opportunities for greater operational leverage and factoring customer impact into their plans. And tactical opportunities are increasingly complemented by strategic choices, as marketing teams start to build programs around Customer AI data to better target opportunities for growth. Even with such progress already under their belt, Conga is just getting started.

OCX Cognition is a leader in the new enterprise software category—Customer AI. Comprised of configurable, next-generation services, like Generative Analytics, Generative AI, and Automated Machine Learning, Customer AI delivers enterprise-grade predictive analytics that allow companies to radically upgrade their Customer Experience, Customer Success and Renewal Revenue programs. Built on the latest technologies like elastic compute, storage-on-demand and AI automation, Customer AI delivers a complete, continuous, unified view of customer analytics that unlocks productivity gains for teams throughout the business.