



Case Study: From Underutilized Platform to Customer Success Engine

A mid-stage B2B SaaS company using Planhat partnered with Kinetify when they realized less than 10% of the platform's capabilities were being used. Their CS team was stretched thin, relying on manual workflows and lacking automated customer journeys. Visibility was low and insights were rare.

Kinetify helped them:

- Automate tech-touch customer journeys to cover more accounts
- Build actionable dashboards for product usage, KPIs, upsell, churn, and team performance
- Re-implement, test, and validate direct Planhat integrations

Business Impact:

As a result of a six-month transformation, the company achieved a **9-point jump in Net Promoter Score (NPS)** and a **10% boost in Net Revenue Retention (NRR)**. Strategic, jointly-run CS and sales campaigns targeted high-potential customers for proactive engagement and expansion, fueling measurable revenue growth. With automation now handling core processes, CSMs focused on strategic accounts while the broader base experienced consistent, tech-driven outreach—delivering customer success at scale

Choosing Kinetify to Optimize Your Planhat & CS Operations

Choosing Planhat is an investment in smarter customer experience and retention, but most companies leave too much value untapped.

Kinetify's seasoned customer success executive brings both strategic leadership and hands-on technical experience. Unlike partners who only configure features, we know what a CS team actually needs and we build for maximum impact.

We work alongside you: identifying pain points, surfacing hidden opportunities, and optimizing Planhat to deliver genuine ROI. Our approach includes coordination between customer success and sales, ensuring that CS teams and revenue functions collaborate to spot upsell and expansion opportunities, connect the dots on customer growth, and make Planhat a true engine for pipeline and retention.

Why Companies Choose Kinetify

Deep CS Leadership

10+ years building and scaling SaaS customer success organizations—Kinetify leads every engagement with real operational experience and functional best practice.

Hands-On Delivery

Projects are directly led by Kinetify's CS practice head, bringing both vision and accountability.

Workshops & Enablement

Hands-on interactive workshops accelerate adoption, bridge knowledge gaps, and ensure best practices are fully embedded into daily workflows. Your CS organization gets actionable training mapped to your real-world challenges and data.

Intellectual Property & Proven Frameworks

Benefit from proprietary Kinetify playbooks, maturity models, diagnostic tools, and industry benchmarks—giving your team a ready-to-use toolkit built on years of success.

Full RevOps Capabilities

Integrated expertise across data analytics, CRM, enterprise sales leadership, GTM strategy, and customer success. We unite the full revenue engine—building insight-driven processes, seamless reporting, and scalable growth motions that drive performance from the first touch to lasting expansion

Transformation Capabilities & Technical Expertise

Expertise delivering large-scale process redesign, integration, and

change management for complex SaaS environments—maximizing platform adoption, system interoperability, and measurable ROI across global enterprise operations

Scale, Collaboration & Revenue Growth

We help Customer Success and Sales teams work hand-in-hand, uncovering opportunities to drive upsell, product adoption, and measurable revenue growth—not just retention.

Quick Wins and Lasting Impact

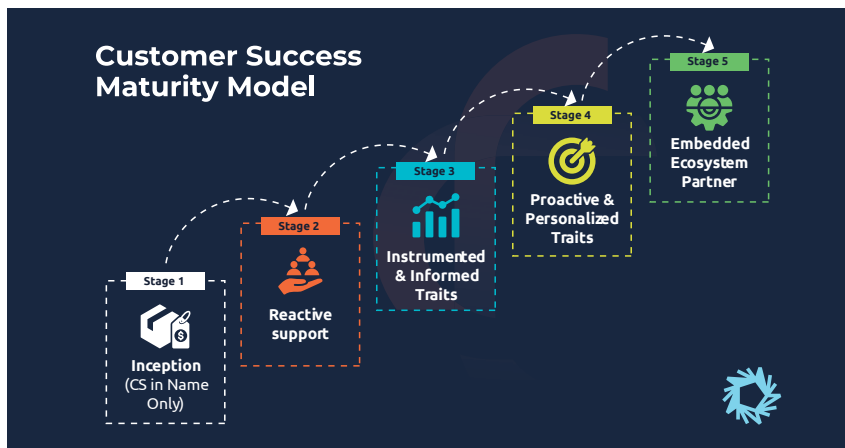
Every engagement delivers tangible early wins—automation, reporting, process fixes—followed by a sustainable roadmap for growth, efficiency, and collaboration across your entire customer-facing organization.

Technology-Led Transformation

Kinetify treats Planhat optimization as a transformation—not just a technical project. By aligning platform design, process, and data, companies unlock measurable ROI, scalable workflows, and seamless CS–Sales collaboration.

Comprehensive Health Check

- Each project starts with a holistic review of Planhat setup, workflows, data, team usage, and integration.
- Stakeholder interviews uncover blind spots and automation opportunities.
- Deliverables include a best-practices scorecard, maturity stage identification, prioritized improvement plan, and a list of quick wins that can be implemented immediately for demonstrable impact.



Root Cause Analysis & Actionable Recommendations

- We look beyond symptoms to diagnose what’s holding you back—from lingering manual processes to missed upsell signals.
- Our maturity model guides recommended actions—always rooted in what the best CS teams actually do.

Custom Optimization & Success Plan

- Once gaps are known, Kinetify’s team rebuilds dashboards, automates journeys, sorts account assignments, standardizes reporting, and works side-by-side to ensure improvements are real.
- Improvements typically go live in weeks—with continued collaboration for a few months depending on scale.

About Kinetify

Kinetify is an IP-based RevOps and Sales transformation consultancy that brings deep expertise across the entire go-to-market funnel—combining enterprise sales leadership, customer success expertise, rigorous data analytics, and scalable process design. The company specializes in bringing order to chaos for scaling SaaS businesses, replacing suboptimal, DIY, fragmented workflows with next-generation operating models and best-in-class enablement

Customer Success Practice

Kinetify’s CS Practice specializes in helping SaaS businesses optimize and scale their customer teams—from org design and hiring to process improvement and platform implementations.

Planhat Sub-Practice

Our dedicated Planhat service covers audits, deployments, optimizations, and enablement—turning underused platforms into engines for automated engagement, intelligent growth, and coordinated revenue.

With years of experience at companies like Hackett Group, Coupa, RingCentral, and top SaaS portfolio brands, Kinetify brings expertise trusted by industry leaders.

Trusted by Industry Leaders



Contact

Melissa McMillan

VP of Customer Success Practice, Kinetify
San Francisco, CA

- 📞 415.917.7336
- ✉️ melissa@kinetify.com
- 🌐 linkedin.com/in/melissa-mcmillansf/
- 🌐 www.kinetify.com