

About This Document

This document provides a comprehensive example of how a B2B SaaS company can leverage the Easy CS application to structure and manage its post-sales operations. Through a fictional customer scenario, it illustrates how to define a Customer Success Plan, track strategic engagements, manage tasks, capture customer feedback, and monitor account health using Easy CS. This use case is designed to help prospective users understand the practical application of the platform and visualize how Easy CS can support scalable, goal-driven Customer Success practices.

Use Case – Easy CS: B2B SaaS Customer Post-Sales Operation

Company Context

Company Name: AcertaAI

Industry: B2B SaaS – Predictive Maintenance for Manufacturing

Team using Easy CS: Customer Success

Number of Customers: 120+ industrial clients across Brazil and LATAM

SaaS Scope: Cloud-based platform that uses machine learning to monitor machinery, predict failures, and reduce unplanned downtime.

Client Context

Client Name: Metalurgia Fênix

Headquarters: Belo Horizonte, Brazil

Size: Mid-market manufacturer with 3 production sites

Client Situation:

Metalurgia Fênix recently signed a 2-year contract with AcertaAI to monitor their forging and machining equipment. The client's main goals are to reduce downtime, lower maintenance costs, and improve visibility for plant managers. They're using AcertaAI's Enterprise plan with 65 licenses.

Easy CS

Search...

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Home

Accounts

Customer Success Plans

Engagements

Voices of Customer

Reports

Analytics

Account

Metalurgia Fênix

+ Follow

New Contact

New Case

New Note

Type

Phone

Website

Account Owner

Account Site

Industry

Alexandre Siqueira

Manufacturing

Related

Details

🚫 We found no potential duplicates of this Account.

🕒 Customer Success Plans (1)

New

Customer Success Plan Name

Fênix - 2025 Success Plan

View All

🚗 Engagements (4)

New

Engagement Name

Initial Onboarding Kickoff

Quarterly Business Review - Q2

Executive Relationship Meeting

Severity 1 Incident Support

Activity

Chatter

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Filters: All time · All activities · All types

Refresh · Expand All · View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Customer Success Plan

Plan Name: Fênix - 2025 Success Plan
Owner: Carla Mendes (Customer Success Manager)
Created on: April 3, 2025

Business Objectives:

- 1. Reduce Unplanned Downtime by 25% in 12 months
→ Target driven by production losses in Q4-2024.
- 2. Lower Total Maintenance Costs by 15%
→ Planned reduction through preventive instead of reactive actions.
- 3. Enable Data-Driven Decision-Making Across Plants
→ Targeting plant managers and operations directors.

Easy CS

HomeAccountsCustomer Success PlansEngagementsVoices of CustomerReportsAnalytics

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Agreed with customer

Finalized

Canceled

Mark Status as Complete

RelatedDetails

Information

Customer Success Plan Name

Fênix - 2025 Success Plan

Account

Metalurgia Fênix

Date

03/04/2025

Plan

CSP-00000004

Status

Agreed with customer

Notes

Business Objectives

1. Reduce Unplanned Downtime by 25% in 12 months

2. → Target driven by production losses in Q4-2024.

3. Lower Total Maintenance Costs by 15%

4. → Planned reduction through preventive instead of reactive actions.

5. Enable Data-Driven Decision-Making Across Plants

Strategic Initiatives:

- Deploy AI-based Anomaly Detection across all lines by Q2
Status: In Progress. Delayed by integration with legacy SCADA system.
- Train 100% of shift supervisors on the Insights Dashboard
Status: Scheduled. Live training planned for July.
- Set up automated weekly reports to 3 director-level stakeholders
Status: Completed. Reports reviewed in April and approved by client.

The screenshot shows the 'Easy CS' dashboard with the 'Customer Success Plans' tab selected. A progress bar at the top indicates the status of the plan: 'Agreed with customer' (active), 'Finalized', and 'Canceled'. Below the progress bar, there is a 'Related' section with a 'Details' tab. The 'Customer Success Plan Tasks (3)' are listed in a table:

Customer Success Plan Tasks Name	
Deploy AI-based Anomaly Detection across all lines by Q2	▼
Train 100% of shift supervisors on the Insights Dashboard	▼
Set up automated weekly reports to 3 director-level stakeholders	▼

A 'View All' link is located at the bottom of the table. A 'New' button is also present in the top right corner of the task list.

The screenshot shows the details of a specific Customer Success Plan task: 'Deploy AI-based Anomaly Detection across all lines by Q2'. The 'Details' tab is selected. The task is owned by 'Alexandre Siqueira'. The 'Customer Success Plan' is 'Fênix - 2025 Success Plan'. The 'Status' is 'Doing'. The 'Due Date' is not specified. The 'Notes' section contains the text: 'Status: In Progress. Delayed by integration with legacy SCADA system.' The 'Created By' is 'Alexandre Siqueira' on '31/05/2025 16:54'. The 'Last Modified By' is 'Alexandre Siqueira' on '31/05/2025 16:54'. There are buttons for 'New Contact', 'Edit', and 'New Opportunity' in the top right corner.

Engagements

Easy CS

HomeAccountsCustomer Success PlansEngagementsVoices of CustomerReportsAnalytics

Search...

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Account

Metalurgia Fênix

+ Follow

New Contact

New Case

New Note

🚗 Engagements (4)

New

Engagement Name
Initial Onboarding Kickoff
Quarterly Business Review - Q2
Executive Relationship Meeting
Severity 1 Incident Support

View All

No past activity. Past meetings and tasks marked as done show up here.

Initial Onboarding Kickoff

Date: April 5, 2025

Type: Onboarding

Participants: IT, Maintenance Team, CSM

Notes:

Kickoff meeting to align on deployment schedule, integrations, and user provisioning.

Tasks:

- [✓] Share user provisioning template – Completed April 5
- [✓] Schedule technical setup call – Completed April 8
- [] Send welcome kit and user guide – Due May 1

The screenshot displays the 'Easy CS' application interface. At the top, there is a navigation bar with a search bar and various icons. Below the navigation bar, a breadcrumb trail shows the path: Home > Accounts > Customer Success Plans > Engagements. The main content area features a progress bar at the top with three stages: 'Completed' (highlighted in blue), 'Canceled', and 'Mark Status as Complete'. Below the progress bar, the 'Engagement' details are shown in a form. The form includes fields for 'Engagement Name' (Initial Onboarding Kickoff), 'Type' (Onboarding), 'Date' (05/04/2025), 'Notes' (Kickoff meeting to align on deployment schedule, integrations, and user provisioning), 'Participants' (IT, Maintenance Team, CSM), 'Responsible' (Alexandre Siqueira), and 'Customer Success Plan' (Fenix - 2025 Success Plan). Below the engagement details, there is a section for 'Engagement Tasks (3)' with a 'New' button. The tasks listed are 'Share user provisioning template', 'Schedule technical setup call', and 'Send welcome kit and user guide', each with a dropdown arrow indicating its status.

Easy CS

Search...

Home Accounts Customer Success Plans Engagements Voices of Customer Reports Analytics

Completed Canceled Mark Status as Complete

Engagement

Engagement Name
Initial Onboarding Kickoff

Type
Onboarding

Date
05/04/2025

Notes
Participants: IT, Maintenance Team, CSM
Notes:
Kickoff meeting to align on deployment schedule, integrations, and user provisioning.

Responsible
Alexandre Siqueira

Customer Success Plan
Fenix - 2025 Success Plan

Engagement Tasks (3) New

Engagement Task Name

Share user provisioning template

Schedule technical setup call

Send welcome kit and user guide

Easy CS

[Home](#)
[Accounts](#)
[Customer Success Plans](#)
[Engagements](#)
[Voices of Customer](#)
[Reports](#)
[Analytics](#)

Q Search...

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Engagement Task

Share user provisioning template

[New Contact](#)
[Edit](#)
[New Opportunity](#)

Related

Details

Engagement Task Name

Share user provisioning template

✎

Engagement

Initial Onboarding Kickoff

✎

Type

Meeting preparation

✎

Notes

✎

Start Date

✎

End Date

05/04/2025

✎

Status

Completed

✎

Priority

Medium

✎

Created By

👤 Alexandre Siqueira

31/05/2025 16:56

Owner

👤 Alexandre Siqueira

Last Modified By

👤 Alexandre Siqueira

31/05/2025 16:56

Quarterly Business Review - Q2

Planned for: July 12, 2025

Type: QBR

Participants: Plant Managers, CFO, CSM

Objective: Present performance impact from deployment, review KPIs and engagement plan for next quarter.

Tasks:

- [] Prepare QBR deck – Due July 5
- [] Export usage and downtime trend data – Due July 4
- [] Book executive prep call – Due July 3

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HomeAccountsCustomer Success PlansEngagementsVoices of CustomerReportsAnalytics

PlannedIn ProgressCompletedCanceled

✓ Mark Status as Complete

Engagement

Engagement Name

Quarterly Business Review - Q2

Type

QBR

Date

12/07/2025

Customer Success Plan ⓘ

Fênix - 2025 Success Plan

Notes

Participants: Plant Managers, CFO, CSM

Objective: Present performance impact from deployment, review KPIs and engagement plan for next quarter.

Responsible

👤 Alexandre Siqueira

Engagement Tasks (3)

New

Engagement Task Name

Prepare QBR deck

Export usage and downtime trend data

Book executive prep call

View All

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HomeAccountsCustomer Success PlansEngagementsVoices of CustomerReportsAnalytics

Engagement Task

Prepare QBR deck

New ContactEditNew Opportunity

RelatedDetails

Engagement Task Name

Prepare QBR deck

Engagement

Quarterly Business Review - Q2

Type

Meeting preparation

Notes

Start Date

End Date

Status

Not Started

Priority

Created By

👤 Alexandre Siqueira, 31/05/2025 16:59

Owner

👤 Alexandre Siqueira

Last Modified By

👤 Alexandre Siqueira, 31/05/2025 16:59

Executive Relationship Meeting

Date: May 15, 2025

Type: Relationship

Participants: New COO at client side

Notes:

Introductory session with recently hired COO to align strategic expectations.

Tasks:

- [✓] Map new executive org chart – Completed May 10
- [] Send summary and welcome note post-meeting – Due May 16

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HomeAccountsCustomer Success PlansEngagementsVoices of CustomerReportsAnalytics

Completed

Canceled

Mark Status as Complete

Engagement

Engagement Name

Executive Relationship Meeting

Type

Meeting

Date

15/05/2025

Notes

Participants: New COO at client side
Notes: Introductory session with recently hired COO to align strategic expectations.

Responsible

Alexandre Siqueira

Customer Success Plan

[Fênix - 2025 Success Plan](#)

Engagement Tasks (2)

New

Engagement Task Name

[Map new executive org chart](#)

[Send summary and welcome note post-meeting](#)

View All

Easy CS

Search...

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Home

Accounts

Customer Success Plans

Engagements

Voices of Customer

Reports

Analytics

Planned

In Progress

Completed

Canceled

Mark Status as Complete

Engagement

Engagement Name

Executive Relationship Meeting

Type

Meeting

Date

15/05/2025

Customer Success Plan

Fênix - 2025 Success Plan

Notes

Participants: New COO at client side

Notes: Introductory session with recently hired COO to align strategic expectations.

Responsible

Alexandre Siqueira

Engagement Tasks (2)

New

Engagement Task Name

Map new executive org chart

Send summary and welcome note post-meeting

View All

Severity 1 Incident Support

Date: April 27, 2025
Type: Critical Support
Context:
Anomaly detection stopped reporting for 12 hours at Plant 2. Incident escalated.

- Actions Taken:
- [✓] Logged Sev1 ticket with engineering – Completed April 27
 - [✓] Provided workaround with manual data push – Completed April 27
 - [✓] Sent RCA document to client – Completed April 29

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Easy CSHomeAccountsCustomer Success PlansEngagementsVoices of CustomerReportsAnalytics

✓

✓

Completed

Canceled

✓ Mark Status as Complete

Engagement

Engagement Name

Severity 1 Incident Support

Type

Incident Support

Date

27/04/2025

Customer Success Plan

Notes

Context:
Anomaly detection stopped reporting for 12 hours at Plant 2. Incident escalated.

Responsible

 Alexandre Siqueira

Engagement Tasks (3)

New

Engagement Task Name

Logged Sev1 ticket with engineering

Provided workaround with manual data push

Sent RCA document to client

View All

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Easy CSHomeAccountsCustomer Success PlansEngagementsVoices of CustomerReportsAnalytics

Engagement Task

Sent RCA document to client

New ContactEditNew Opportunity

Related

Details

Engagement Task Name

Sent RCA document to client

Engagement

Severity 1 Incident Support

Type

Follow-up with Customer

Notes

Start Date

End Date

29/04/2025

Status

Completed

Priority

Owner

 Alexandre Siqueira

Created By

 Alexandre Siqueira, 31/05/2025 17:03

Last Modified By

 Alexandre Siqueira, 31/05/2025 17:03

Voice of Customer Entry

Date: May 22, 2025

Captured by: Carla Mendes (CSM)

Theme: Feature Request

Feedback:

Plant supervisors would benefit from a mobile app version of the Insights Dashboard to check alerts on the go.

Status: Logged and shared with Product Team for assessment in the next planning cycle.

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Home

Accounts

Customer Success Plans

Engagements

Voices of Customer

Reports

Analytics

✓

In Progress

Closed

Canceled

✓ Mark Status as Complete

✓ Voice of Customer

Voice of Customer Name

Insights Dashboard

Description

Feedback:
Plant supervisors would benefit from a mobile app version of the Insights Dashboard to check alerts on the go.
Status: Logged and shared with Product Team for assessment in the next planning cycle.

Date

22/05/2025

Reported by

Mariana Guimarães

Responsible

Alexandre Siqueira

✓ Section

Account

Metalurgia Fênix

Created By

Alexandre Siqueira, 31/05/2025 17:04

Last Modified By

Alexandre Siqueira, 31/05/2025 17:04

Record Type

Status

Customer Health Indicators

Customer Health Indicators

Indicator	Value	Trend	Notes
License Usage	61 of 65	Stable	94% usage – good adoption across 3 plants
Net Promoter Score (NPS)	8	Improved	Increased from 6 → 8 after April incident resolution
Feature Adoption (AI Models)	3 of 4	Improving	Plant 3 will be enabled in June
Support Tickets (last 30d)	2 total	Decreasing	Both low-severity, resolved within SLA
Engagement Score (Easy CS)	85 / 100	↑	Based on task completion and executive meeting attendance

Easy CS

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Easy CS

Home

Accounts

Customer Success Plans

Engagements

Voices of Customer

Reports

Analytics

✕

Account

Metalurgia Fênix

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New Contact

New Case

New Note

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Customer Health Indicators (5)

New

Customer Health Indicators Name

0006

0005

0003

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0004

View All

Easy CS

Q Search...

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Easy CS

Home

Accounts

Customer Success Plans

Engagements

Voices of Customer

Reports

Analytics

Customer Health Indicators

0006

New Contact

Edit

New Opportunity

Related

Details

Customer Health Indicators Name

0006

Owner

Alexandre Siqueira

Account

Metalurgia Fênix

Type

Feature Adoption

Number

3

Date of collection

12/05/2025

Created By

Alexandre Siqueira

, 31/05/2025 17:07

Last Modified By

Alexandre Siqueira

, 31/05/2025 17:07

Activity

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Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

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Easy CS

Home

Accounts

Customer Success Plans

Engagements

Voices of Customer

Reports

Analytics

Customer Health Indicators

0003

New Contact

Edit

New Opportunity

Related

Details

Customer Health Indicators Name

0003

Owner

Alexandre Siqueira

Account

Metalurgia Fênix

Type

Percentage of licenses used

Number

61

Date of collection

31/05/2025

Created By

Alexandre Siqueira

, 31/05/2025 17:05

Last Modified By

Alexandre Siqueira

, 31/05/2025 17:05

Activity

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Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

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