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Featured Application

## **From Escalated Support to Intelligent Engagement: How Logicalis Redefined Customer Success with Generative AI**

### **1. Context and Initial Challenge**

In 2023, Logicalis faced a challenge common to many rapidly growing B2B companies: how to maintain the quality of the customer experience in the face of an increasingly diverse and demanding client base. Despite having a highly skilled team of Customer Success Managers (CSMs), there was a clear gap in the ability to personalize interactions at scale, detect risk signals in real time, and act proactively. The traditional model based on 1:1 interactions and static segmentation, was beginning to show signs of strain.

Additionally, there was a strategic challenge in balancing new monetization approaches for the CSM role — now increasingly viewed as a revenue impacting function while also scaling smaller accounts through a digital CSM approach.

### **2. Strategic Vision and Hypotheses**

The digital transformation of Customer Success at Logicalis began with an intensive and manual market analysis effort. Over the course of six months, the team conducted in-depth reviews of TSIA reports, benchmarked leading companies in Digital Customer Success, and held strategic discussions with subject matter experts. At that time, generative AI had not yet been fully implemented in internal tools; instead, publicly available solutions were used for simulations, studies, and scenario development.

Before deploying any proprietary technology, we structured the entire ecosystem to support a robust Digital Customer Success model. We engaged strategic departments such as Finance, Marketing, Sales, and Delivery in building the operational model and defining segmentation criteria. Specific customer journeys were mapped and redesigned, using AI to automatically tag clients based on industry segment, journey stage, and engagement profile. This same AI began recommending the most effective communication and engagement paths for each cluster, establishing a solid foundation for predictive decision-making and scalable actions.

### **3. Solution Architecture**

With the model validated and the organizational structure in place, we began the hands-on implementation of Digital Customer Success, focusing on three strategic pillars:

1. We scaled operations to reach the entire customer base including small and medium-sized enterprises without compromising delivery quality.
2. We preserved the essential human element of Customer Success by leveraging SenseData, Logicalis' Customer Success platform, to enhance rather than replace client proximity.
3. Based on insights from prior analyses, we prioritized expansion and renewal playbooks tailored to each customer journey profile.

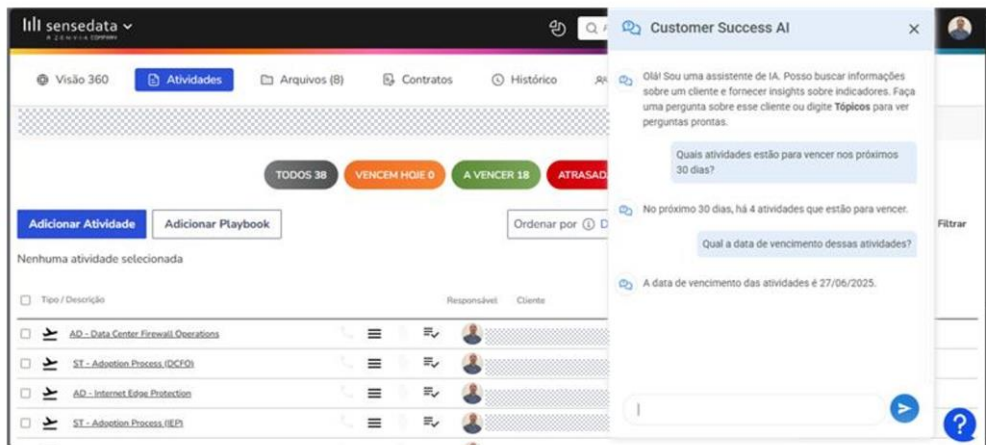
As part of this execution, we hired two new analysts dedicated to the function and appointed a Customer Success Manager to lead the Digital CS operation, with exclusive responsibility for managing a portfolio of over 500 clients. This team was essential for ensuring personalization at scale and disciplined execution of digital playbooks.

Additionally, the adoption of the SenseData platform was critical in consolidating actionable data into a single environment. Through this platform, we began monitoring real-time indicators such as email delivery, open rates, click-throughs, and content engagement. With this information, we were able to measure the accuracy and effectiveness of our communications and quickly adjust strategies as needed.

The AI embedded in the platform and applied to the playbooks helped reduce manual tasks previously performed by Customer Success Managers by approximately 35%, freeing up time for more strategic and relationship-focused activities.



## Example of Generative AI Applied to Logicalis' Digital Customer Success Operation:



In the image above, you can see the Customer Success AI functionality integrated into the SenseData platform, representing a practical advancement in the use of generative AI in the daily operations of Customer Success Managers (CSMs). The AI assistant acts as a co-pilot for the operation, interpreting portfolio data and autonomously responding to questions about upcoming renewals, pending activities, and operational alerts.

In this example, the CSM interacts with the AI, which identifies upcoming renewals and responds in real time with due dates and task volumes, helping optimize the CSM's workflow.

### 4. Transformational Results

- Net Revenue Retention (NRR) in the mid-market segment grew by 12%, driven primarily by automated renewals and AI-based expansion recommendations.
- With an estimated investment of less than 1% of the total revenue generated (over USD 25 million), we developed a proprietary CSM index based on signals, behavior, and journey profile—making the model highly replicable.
- NPS among digitally served clients increased by 18 points.
- 90% of renewals were analyzed using risk, value, and expansion potential criteria (Renewals Analyzed Rate).
- We achieved a 72% win rate on all contested renewals.
- The average response time to risk signals dropped from 5 days to under 8 hours.
- We achieved a 25% reduction in total working hours for the allocated team, allowing that time to be redirected toward high-value activities such as journey planning and data analysis.

### 5. Lessons Learned and Next Steps

The journey at Logicalis demonstrated that adopting generative AI in Customer Success requires much more than just technology, it demands a transformation in culture, processes, and mindset. The most significant lesson learned was that intelligent scaling is indeed possible, provided the focus remains on delivering real and perceived value to the customer.

Next steps include advancing predictive automation for onboarding, using deep learning to detect advocates, achieving full integration with the customer lifecycle, expanding the team with new human and technological resources, and continuously strengthening the partnership with the RevOps team as a key element in the governance and sustainable growth of the digital model. More than just a project, this initiative has become a new way of thinking about Customer Success.





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