CASE STUDY — CUSTOMER SUCCESS TRANSFORMATION

Replacing Gainsight with Salesforce Experience Cloud

How SaaS Business Advisors helped a $2B SaaS company transform its Customer Success operation — replacing Gainsight, modernizing the CS rep experience, and enabling a digital-first customer journey. Delivered on time and on budget against a hard March 31 deadline.

WHY SAAS BUSINESS ADVISORS

This was the third engagement SaaS Business Advisors led for this client — and by this point, the relationship was deeply established. The CIO knew the team. The business trusted the methodology. And when a program of this complexity needed an executive leader who could hold the strategy and the delivery together simultaneously, there was no search process. SaaS Business Advisors was the call.

What made this engagement different was its ambition. It didn't start as a transformation — it started as a platform replacement. SaaS Business Advisors helped the client see that a lift-and-shift of Gainsight into Salesforce was a missed opportunity. The real prize was using the migration as the starting point for a broader CS evolution: standardizing how the team operated, enabling digital-first customer journeys, and building the data foundation for AI-powered insights. That strategic reframe is what separates a vendor from an advisor.

3 of 4	This was the third of four engagements SaaS Business Advisors led for this client — each one deepening the partnership and building on the foundation of the last.

THE SITUATION

The trigger was a hard deadline. The Gainsight contract was expiring on March 31, 2025 — and renewing it wasn't the plan. The company had already been investing in Salesforce, and the logic was clear: consolidate onto a single platform, eliminate duplicate software costs, and stop asking the Customer Success team to work across disconnected systems.

But the pain ran deeper than the technology bill. CS reps were spending an average of 11 hours per week on administrative tasks inside Gainsight — duplicate data entry, swivel-chairing between systems, and manual processes that should have been automated. Customer visibility

was fragmented. Account planning lacked structure. And digital customer journeys — the automated, scalable programs needed to serve a growing base without adding headcount — didn't exist in any meaningful way.

The business initiated a $250K discovery phase in August and estimated the full program at approximately $1M. What emerged from discovery was bigger than a migration. It was the foundation of a new CS operating model.

THE BUSINESS CASE

The financial case was built around three value streams: software savings from eliminating Gainsight, headcount efficiency gains as automation freed CS reps to manage more accounts, and revenue growth through improved digital customer journeys, expansion programs, and renewal performance.

$300K	5.5 hrs	$1M	$800K
Annual software savings from Gainsight decommission	Saved per CSM per week through automation	Annual CS spend reduction via 5 HC avoidance	Revenue growth opportunity via digital programs

PROGRAM STRUCTURE

The program was designed in three phases, allowing the team to hit the hard March 31 Gainsight deadline with Phase 1 while continuing to build the transformational capabilities in Phases 2 and 3.

PHASE 1	PHASE 2	PHASE 3
$842K — 17 weeks	**$393K — 9 weeks**	**$311K — 9 weeks**
Core platform build: Customer 360, Success Plans, Task Management, Digital First journeys, AI Summarization, Surveys. Gainsight decommissioned March 31.	Enhanced capabilities: advanced health scoring, remaining digital journeys, Einstein AI sentiment analysis, churn prediction, advanced analytics.	Full transformation: timeline intelligence, account plan scaling, global CSM views, advanced filtering, full program completion.

To manage costs and accelerate knowledge transfer, change management and data migration were brought in-house to the client's own team — a strategic decision that reduced external spend and built lasting internal capability. SaaS Business Advisors structured and supported that transition, ensuring quality was maintained while the client team took ownership.

THE CHALLENGE

The March 31 deadline was immovable. Missing it meant paying for both Gainsight and Salesforce simultaneously — a sunk cost that would have been difficult to defend to the board. Every decision in the program had to be made with that clock running.

The scope challenge was equally real. Discovery surfaced over 330 requirements. Getting to a deliverable Phase 1 meant making hard prioritization calls — reducing that list to 264 requirements by removing or deferring non-essential features, without compromising the core value the business needed to realize. That discipline, knowing what to cut and being able to defend those decisions to stakeholders, is one of the hardest things to do well in a large program.

> ***"What started as a platform replacement became a strategic starting point to evolve the entire CS operating model. The goal was never just to replicate Gainsight — it was to leapfrog it."***

The vendor selection process added another layer of complexity. Five vendors were evaluated — Salesforce, ChurnZero, Gainsight, Certinia, and Totango — each assessed against scope coverage, risk, and timeline viability. Salesforce won on platform breadth, FedRAMP readiness, and the ability to consolidate capabilities the company was already paying for. The right decision wasn't the easiest one — it required the most build work — but it served the business over the long term.

THE APPROACH

SaaS Business Advisors structured the program using its six-stage methodology — giving the client a clear line of sight from discovery through go-live across all three phases. The work spanned Customer Success leadership, IT, data, change management, and two external vendors, all coordinating against a single program plan.

Seven core capability areas were delivered across the program: Customer 360, Success Plans, Task Management and Slack integration, Digital First journeys via Marketing Cloud, AI Summarization, Surveys and Feedback, and Timeline. Each was scoped, sequenced, and prioritized to maximize Phase 1 impact while preserving a clear roadmap for what came next.

The AI components were built in from the start — not added as an afterthought. Einstein AI account summarization, sentiment analysis, churn prediction, and engagement scoring were scoped as core deliverables. That decision reflects SaaS Business Advisors' view that AI capability is most valuable when it's embedded in the workflow, not bolted on afterward.

THE OUTCOME

Phase 1 was delivered on time and on budget. Gainsight was decommissioned on March 31, 2025 — the hard deadline — with zero gap in CS operations. The full program came in at $1.54M across three phases, consistent with the original estimate.

CS rep efficiency

- 5.5 hours/week saved per CSM
- Duplicate data entry eliminated
- 5–7 CSM headcount avoidance
- CSMs able to manage more accounts

Customer experience

- 38 automated digital journeys live
- Personalized onboarding and renewal
- NPS and survey programs automated
- 360° customer view in one platform

Financial impact

- $300K annual Gainsight savings
- $720K–$1M annual HC cost avoidance
- $800K revenue growth opportunity
- Delivered on time and on budget

Beyond the metrics, the program delivered something harder to quantify: a CS organization that operates from a single system of record, with the data, automation, and AI tools to be proactive rather than reactive. The foundation built here positions the company to scale its customer base without scaling its CS headcount proportionally — a competitive advantage that compounds over time.

THE TAKEAWAY

The best transformation programs don't just solve today's problem — they build the platform for the next phase of growth. What began as a forced migration became a strategic leap: a modern, AI-enabled CS operation built on a unified platform, delivered against a hard deadline, and structured to keep improving as the business evolves. That's the kind of outcome that's only possible when your program lead has done it before — and knows how to turn a constraint into an opportunity.

Salesforce Experience Cloud · Marketing Cloud · Gainsight Migration · Customer Success · Einstein AI · Digital First · Change Management · CS Transformation