

CASE STUDY

How Data Storytelling Transformed Indio's Internal Reporting

“Out of all the tools we have at Indio, Matik has had the biggest impact within the Customer Success org, no question.”

Tim, Customer Success Manager Lead

~2.7k

Customer Success Manager hours saved in the past year with Matik

- ✓ Over 138k data insights were created via Matik
- ✓ 1-2 minutes per presentation compared to 30+ minutes before Matik
- ✓ More than 5,400 presentations generated over 12 months

Challenge

Indio is on a mission to power the global business of insurance by helping agents win more business and spend less time on redundant operational tasks. With an eye on streamlining workflows for their customers, it made sense that Indio also had an internal goal to reduce repetitive tasks for their own Customer Success Managers (CSMs).

Indio CSMs were spending a lot of time putting together account reviews in order to prepare for internal meetings with their managers. These reviews summarized the progress and overall health of each account, so the team could make important decisions and deliver the most value to their customers.

To make these account reviews, CSMs were combing through Looker, going into their internal database, and even logging into the client’s Indio portal to get the data that they needed. Then, CSMs were dumping that data into Salesforce in bulk so they could review it with their manager one-on-one.

This process was taking more than 30 minutes for each account, and CSMs were going through it every two weeks. Indio needed a more streamlined way to deliver these insights to their CS team, so CSMs could have more time back for customer-facing conversations.

“Out of all the tools we have at Indio, Matik has had the biggest impact within the Customer Success org, no question. Customer Success Managers can now pull together a comprehensive 1-pager to share with their manager that helps them assess the health of their accounts. No more opening up multiple tabs, no more combing through data, and no more headaches! Just accurate, actionable insights that help us make better decisions and really be there for our customers.”



Tim Chin
Customer Success Manager Lead

Solution

Indio onboarded a CSM Health Check 1-pager to Matik to automate this process.

Now, Indio CSMs go into Matik, select the Health Check 1-pager template, tell Matik which account it’s for, and press “Generate.” With the click of that button, Matik gives them a fully finished presentation.

The Indio CSMs used Matik’s bulk generation feature to generate all of their presentations at once, and were also able to schedule their presentations to be generated automatically on a future date. The CSMs had full control to generate these presentations whenever they needed them, with no lift from their supporting data team or time spent searching through a dashboard with tons of metrics.

Indio also leveraged Matik’s conditional logic, which allowed them to surface only the relevant metrics to a CSM based on the use case they selected for each particular account. This meant no more time spent by CSMs deciding which data points were the most important to assess the health of each different customer.

Impact

Indio CSMs used Matik to generate over 5,400 presentations over a 12 month period. Within these presentations were more than 138k data insights that CSMs would normally have had to find and pull by hand. Now, with Matik, these insights are pulled for them with the click of a button.

Each CSM generated an average of 35 presentations per month, with Matik saving them about 30 minutes per presentation. That’s a time savings of over 2,700 hours for Indio over 12 months - giving each CSM nearly 20 hours back each month to work on more strategic, customer-facing projects.

At the end of the day, metrics from multiple different data sources at Indio are now coming together into one presentation, with Matik doing all of the heavy lifting.

But unlike a dashboard, it’s not a raw data dump that CSMs are receiving.

It’s a narrative, a data story.

Want to start your own story? Reach out to our team to learn more!

Presentations Generated



5,405

over 12 months

Saved time



2,702 hours

Insights Generated



138k