




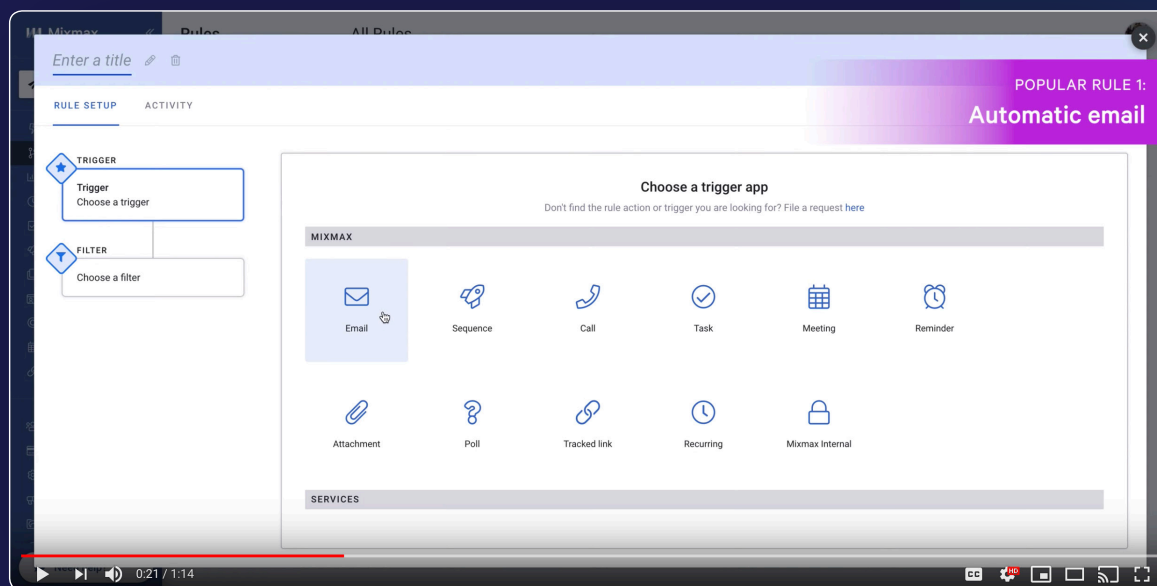
# Mixmax Rules

Mixmax rules are a key part of the Mixmax automation suite. Our automation can not only change your life (seriously!), but also help you provide a flawless customer experience. **Here's how:**

-  Our rules eliminate many of the manual tasks that take away from engaging with your customers.
-  Workflow automation reduces the possibility for human error which means your teams are set up for operational excellence.
-  Our rules work across many applications that you are already using so we're helping you get more from your existing investment in your applications.

At the end of the day it's a win-win. Mixmax rules make your customer success and account management teams more productive. CS/AM teams are empowered to focus on engaging relationships, which makes it easier for your customers to do business with you.

Not familiar with our rules? Here's a quick [1 minute video](#) overview:



# Mixmax Rules for Customer Success

If you're in customer success or account management then you know it's all about engagement, expansion and renewal.

Here's how Mixmax rules will help with all three.



“Mixmax helps my team create a great communication experience.”

Justin Duke, CS Lead, Instapage

## Save time and automate customer engagement.

Place or remove someone from your sequence when:

- ▶ they vote in your Mixmax customer satisfaction or renewal poll
- ▶ a new decision maker is identified\*
- ▶ my customer training session is complete
- ▶ my renewal opportunity is marked as “Closed Won” \*

Update the status of the renewal opportunity when:

- ▶ someone confirms my renewal call\*
- ▶ someone receives all stages of my renewal outreach\*
- ▶ someone votes in my Mixmax customer satisfaction or renewal poll\*

Notify Slack with the good news when:

- ▶ a renewal DocuSign is signed\*
- ▶ my opportunity is marked as closed won\*

## Save time and stay on top of your inbox.

Be notified via Slack or text message when:

- ▶ somebody clicks on a link
- ▶ someone opens your email 3x or more
- ▶ you receive an email from a key stakeholder
- ▶ somebody books a meeting with you
- ▶ someone emails you 30 minutes prior to a meeting you have with them

When someone cancels a meeting with you:

- ▶ automatically send a template to reschedule
- ▶ drop them into a nurturing sequence

*\*these features are available on the Enterprise plan. Ask your Success/Sales contact to learn more!*