



MAGNIFY

CUSTOMER CASE STUDY

# How Flosum Broke Through the CS Ceiling

Flosum deployed Magnify's agentic AI platform to automate CS programs, sharpen retention forecasting, and unlock competitive intelligence.

## Days, Not Weeks

to launch a new CS program vs. old tools

## 3 New Motions

agentic automation, forecasting & competitive intelligence

## 1 Platform

single operating layer replacing disconnected point solutions

COMPANY	Flosum
INDUSTRY	Salesforce DevOps / SaaS
USE CASES	Agentic CS Automation, Retention Forecasting, Competitive Intelligence
KEY TOOLS	Magnify Agentic Automations, AI Research Assistant
INTEGRATIONS	Gainsight, Salesforce, Slack, Pendo, Email

## THE CHALLENGE

## A High-Growth CS Team Hitting a Ceiling

Flosum is a leading Salesforce-native DevOps platform trusted by enterprises to simplify release management and accelerate development cycles. As the business scaled, so did the pressure on Customer Success: more accounts, higher retention expectations, and tighter budgets. Adding headcount was off the table.

The symptoms were familiar. CSMs spent meaningful time pulling data from disconnected systems rather than talking to customers. By the time a risk became visible, the window for easy intervention had often already closed. Expansion opportunities surfaced too late, or not at all. The effort was there. The leverage wasn't.

Health scores told the team something might be wrong, but not what to do or when. Competitive intelligence lived in tribal knowledge and CRM notes that nobody had time to mine. Programs that should have been automated were still running on manual effort and institutional memory. The question wasn't "How do we work harder?" It was: "How do we build something that actually scales?"

*"The constraint was never effort. It was leverage. And now we have it."*

— Flosum Customer Success Leadership

### BEFORE

- CSMs pulling data manually from multiple disconnected systems
- Risk only visible after customers show clear signs of leaving
- Competitive intelligence buried in CRM notes and tribal knowledge
- New programs take weeks to build and require RevOps tickets
- Health scores react to problems rather than predict them

### WITH MAGNIFY

- AI agents monitor every account continuously across all systems
- Risk surfaces early, with a clear window for intervention
- Competitive research retrieved in minutes from existing data
- New programs launch in hours, described in plain language
- Forward-looking health with actual forecasted revenue impact

## THE SOLUTION

## Three Ways Magnify Changed the Game

### 01

#### Agentic Insights Deployed Across the Business

Rather than layering another point solution onto an already fragmented stack, Flosum chose Magnify as the foundation for their first true digital CS program. At the center: Magnify's Analyst Agent, a purpose-built AI research capability that answers complex questions about your customer base in plain language. No SQL, no BI tool, no ops request. Anyone on

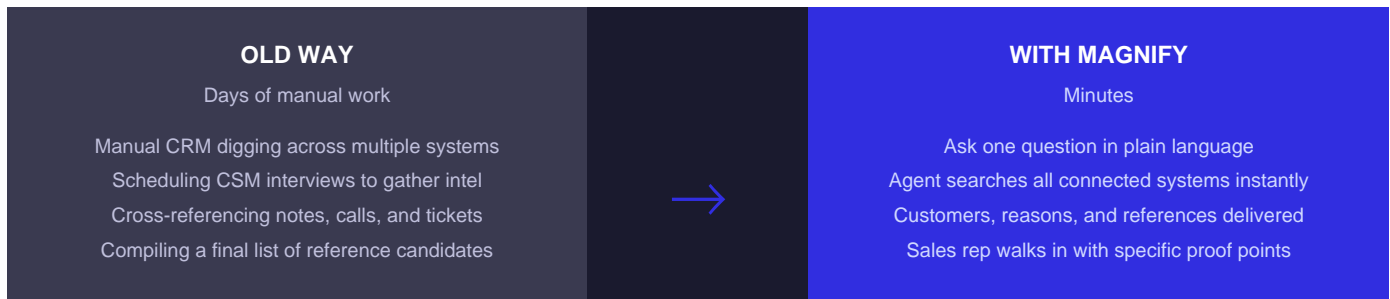
the GTM team can ask a question and get a substantive, sourced answer in minutes, deployed across CS and Sales.

**For Customer Success:** Before an EBR, a CSM might ask what the biggest product usage shifts have been for an account in the last 90 days, and how that compares to similar accounts that renewed. The agent synthesizes signals across product usage, support history, NPS, and engagement data, and can even write the meeting content.

**For Sales:** A live competitive deal crystallized this for the team. Brian Evans, Director of GTM, asked which existing customers had previously used a key competitor, why they switched, and who to approach for a reference. The answer arrived in minutes: specific customers, documented reasons for switching, and matched reference candidates ready to use in a live deal.

- Complex GTM questions answered in plain language, with no SQL or ops tickets
- Account health patterns, expansion signals, and at-risk accounts surfaced across the full book
- Competitive positioning and reference matching delivered in minutes instead of days
- Research capability deployed across CS, Sales, and GTM rather than siloed to one team

*The competitive deal that crystallized everything for Flosum's Sales team:*



## 02

### Agentic CS Automations

Most so-called automated CS programs are automation in name only. Someone still pulls the data, writes the segment, files the RevOps ticket, and waits weeks to find out if any of it worked. Flosum had lived that reality. With Magnify, they left it behind.

Magnify's agentic automations let Flosum describe the outcome they want in plain language, and the agent does the rest. For NPS, that meant a true closed-loop program: personalized surveys with meaningfully higher response rates, followed by automated motions that treat detractors and promoters differently. Every response flows back into health scoring so the signal compounds.

For renewals, CSMs now start each week with a prioritized action plan. Not a dashboard to interpret, not a spreadsheet to parse. An actual list of recommended next steps generated automatically from product usage, support history, engagement data, and health scores. The agent can also take action by writing emails and prepping EBR materials. CSMs described not just time savings, but the cognitive relief of not having to do the analysis themselves.

- Automated NPS closed-loop with different motions for detractors vs. promoters, no manual triage
- Weekly CSM action plans generated automatically from cross-system signals
- New programs standing up in hours rather than weeks, with no RevOps ticket or integration project

## 03

### Retention Forecasting That Actually Predicts

Health scores that flash red after a customer has already decided to leave are not forecasting. They are a lagging indicator dressed up as intelligence. Flosum needed a system that could see risk earlier and surface it in a form their team could actually act on.

Magnify connects signals across every customer touchpoint, including product usage, support history, NPS data, billing changes, and engagement patterns, and synthesizes them into a continuous, forward-looking view of account health with actual forecasted revenue. Rather than requiring a CSM to reconcile data from four different tools, the system does that work automatically and surfaces specific recommendations.

The result is a CS team that stops reacting to risk and starts getting ahead of it. Long-tail customers generating quiet signals that no one had bandwidth to monitor are now visible. When accounts improve, the system updates immediately. CSMs are not carrying outdated risk ratings or chasing false alarms. The model runs continuously.

- Cross-system health scoring synthesizing product, support, NPS, and engagement data
- Proactive risk surfacing with forecasted revenue before the churn window closes
- Dynamic health ratings that update continuously as account behavior changes

*“This is a HUGE win for our team to be able to mine this data from existing customers.”*

— Brian Evans, Director of GTM, Flosum

#### WHAT'S NEXT

## A Program Built to Keep Expanding

Renewals, NPS, and competitive intelligence were the starting point, not the destination. Flosum's plan is to systematize the full digital customer journey: onboarding, adoption, expansion, and advocacy. Each new motion built on the same foundation of connected data, automated triggers, and personalized outreach at scale.

This is what modern CS infrastructure looks like when it's designed to grow: not a collection of point solutions bolted together, but a single agentic operating layer that gets more powerful as more of the customer journey runs through it.

The teams that will define great Customer Success in the next five years won't be the ones that hire the most CSMs or build the most elaborate playbooks. They'll be the ones that build the right system underneath their teams: one that turns signal into action, eliminates analytical drag, and makes proactive, revenue-driving behavior the default rather than the exception.

**ABOUT MAGNIFY****Purpose-Built for Customer Growth Automation**

Magnify connects to every system in a customer's GTM stack, including CRM, support, product analytics, marketing automation, and data warehouses, and maintains a continuously updated semantic layer that resolves entities and normalizes data across all of them. Our AI agents reason across that full signal set to surface churn risk, expansion opportunity, and patterns that would never appear in a single-system view.

Customers use Magnify as a growth engine that runs continuously in the background, getting smarter about their customer base over time, surfacing what matters, and acting on it. CS teams stay focused on the accounts and decisions that require human judgment. Everything else moves at machine speed.

Magnify was recognized on the 2026 Constellation Research Shortlist for Customer Growth Automation, a category we helped define and continue to lead.

**MAGNIFY****Ready to see Magnify in action?**

See how Magnify connects your GTM stack, surfaces what matters, and runs the motions that move the number, all measured to a revenue outcome.

Visit [magnify.io](https://magnify.io) or reach out directly to start the conversation.

[Request a Demo →](#)