CLOUDZERO

CUSTOMER SUCCESS GUIDE

The people and resources behind your account

Who does what, and the fastest way to get an answer.

cloudzero.com

Every CloudZero customer works with a Customer Success Manager and a Technical Account Manager. Behind them is a support team you can reach from Slack or from inside the platform, along with self-paced training, documentation, and release notes. This guide covers each one and when to use it.

CUSTOMER SUCCESS MANAGER

Your CSM

Your partner on goals, the plan to reach them, and the results along the way.

- Works with you to define what success looks like and builds a plan around it
- Leads regular business reviews so progress against your goals stays visible to your leadership
- Helps you bring CloudZero to new teams and stakeholders
- Your first call when something needs escalating or leadership should be involved

Reach out when your priorities change, a new group needs to get started, or something isn't going the way you expected.

TECHNICAL ACCOUNT MANAGER

Your TAM

Your day-to-day partner on configuration, cost allocation, and analysis.

- Knows your environment: connections, data model, and how your costs are organized
- Builds and refines Dimensions so spend maps to your teams, products, and customers
- Sets up dashboards, views, and alerts for the people who need them
- Works through savings opportunities and new data sources with your engineers

Reach out when you're adding a cloud, AI, or SaaS provider, reorganizing teams, or need help reading a number.

Not sure which one to ask? Either is fine. Your CSM and TAM share context on your account and will get your question to the right person.

SUPPORT

Getting help from Support

Fin answers first, and our support engineers take whatever needs a person

CloudZero Support runs on Intercom. Fin, Intercom's AI agent, is trained on our documentation and past support answers, so it can reply right away on most how-to questions. When your question needs a person, Fin passes the conversation to a support engineer with the full history attached, so you won't have to explain it twice.

STEP 1

You ask

In your shared Slack channel or the Messenger inside the app.

STEP 2

Fin replies

Usually within seconds, with links to the relevant docs.

STEP 3

An engineer joins

If Fin can't resolve it, a support engineer picks it up in the same thread.

STEP 4

Your TAM or CSM

Brought in when the fix involves your configuration or account.

INSIDE THE PLATFORM

Messenger

Open the chat Messenger from inside the CloudZero app. You can ask about whatever you're looking at, attach screenshots, and pick the conversation back up later.

Best for how-to questions and anything tied to a specific screen, view, or dashboard.

IN YOUR WORKSPACE

Shared Slack channel

We set up a shared channel between your Slack workspace and ours. Messages posted there go to the same support queue, and Fin and our engineers answer in the thread.

Best for questions your whole team should see, and keeping colleagues in the loop on an open issue.

FOR A FASTER ANSWER, INCLUDE

- The name or link of the view, dashboard, or Dimension
- The time range and cost source involved
- What you expected to see compared with what you saw
- A screenshot, if it's something visual

PLATFORM STATUS

Check **status.cloudzero.com** for current platform status and any known incidents before opening a ticket about an outage.

SELF-SERVE RESOURCES

Learn on your own schedule

Training, documentation, and release notes, open to everyone on your team

TRAINING

CloudZero Academy

Self-paced courses on the platform's core workflows. A good first stop for new users, and a quick way to bring a new teammate up to speed without waiting for a live session.

learn.cloudzero.com

REFERENCE

Documentation

Setup guides for cloud, AI, SaaS, and Kubernetes connections, plus how-tos for Dimensions, dashboards, budgets, Optimize, and AI Hub. The API reference lives here too.

docs.cloudzero.com

WHAT'S NEW

Changelog

Every release, with dates. Skim it before a review with your CSM or TAM and bring questions about anything that could help your team.

docs.cloudzero.com/changelog

Where to go for what

I WANT TO…	START WITH
Set goals or plan a rollout to a new team	**CSM**
Escalate an issue or bring in CloudZero leadership	**CSM**
Connect a new cloud, AI, or SaaS provider	**TAM, with setup guides in Docs**
Change how costs are allocated to teams or products	**TAM**
Understand why a number moved	**TAM**
Get a quick answer on how a feature works	**Fin, via Messenger or Slack**
Report something that looks broken	**Support, via Messenger or Slack**
Train a new teammate	**Academy**
See what shipped recently	**Changelog**
Check whether the platform is up	**status.cloudzero.com**

KEEP THIS HANDY

Share these links with anyone on your team who uses CloudZero. Questions about this guide? Ask your CSM.

learn.cloudzero.com
docs.cloudzero.com
docs.cloudzero.com/changelog
status.cloudzero.com