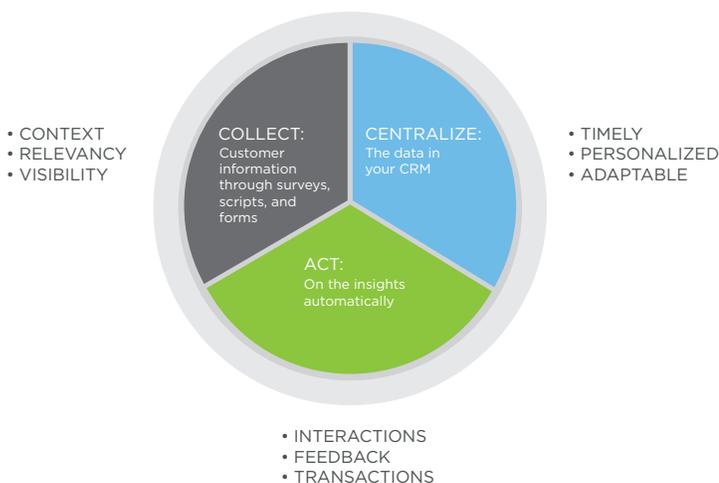# SURVE *with* SALESFORCE

Salesforce® Integration

SURVE is the leading solution to collect, centralize, and act on customer interactions, leveraging the power of CRM, including Salesforce and other leading systems. As the AppExchange® Customer Choice Award Winner for Best Survey Tool five consecutive years, SURVE clearly lives up to its reputation for powerful functionality, great value, and unmatched support for Salesforce users.

SURVE and Salesforce seamlessly integrate, enabling organizations to:
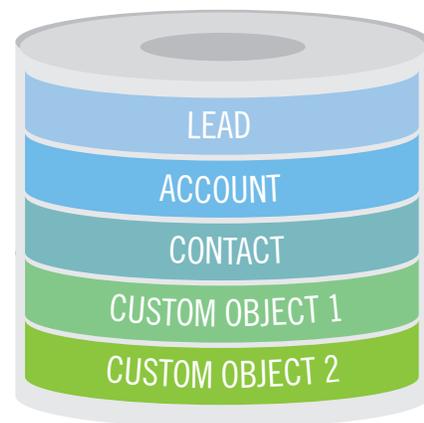
- **COLLECT** customer information through surveys, scripts, and forms.
- **CENTRALIZE** the data you've collected in Salesforce.
- **ACT** on the insights automatically to deepen customer relationships.

CUSTOMER EXPERIENCE FLOW

- CONTEXT
- RELEVANCY
- VISIBILITY

COLLECT: Customer information through surveys, scripts, and forms

CENTRALIZE: The data in your CRM

- TIMELY
- PERSONALIZED
- ADAPTABLE

ACT: On the insights automatically

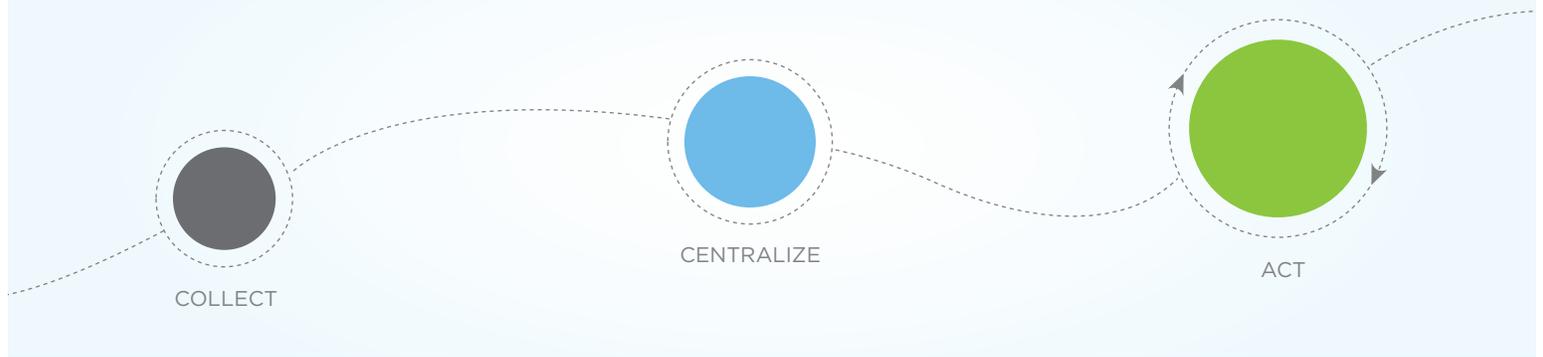- INTERACTIONS
- FEEDBACK
- TRANSACTIONS

The SURVE Difference: Tight CRM Integration

Since the very beginning, SURVE has enabled marketing, sales, and support professionals to integrate customer feedback into Salesforce.

LEAD
ACCOUNT
CONTACT
CUSTOM OBJECT 1
CUSTOM OBJECT 2

salesforce

The result is a smooth and seamless flow of information from fully customizable surveys, dynamic scripts, and interactive forms to anywhere in your CRM. Across your organization, personnel have real-time access to valuable insights that enable them to respond to and serve customers better. Plus, many of these interactions can be automated for hands-off, highly efficient improvements to customer experience.
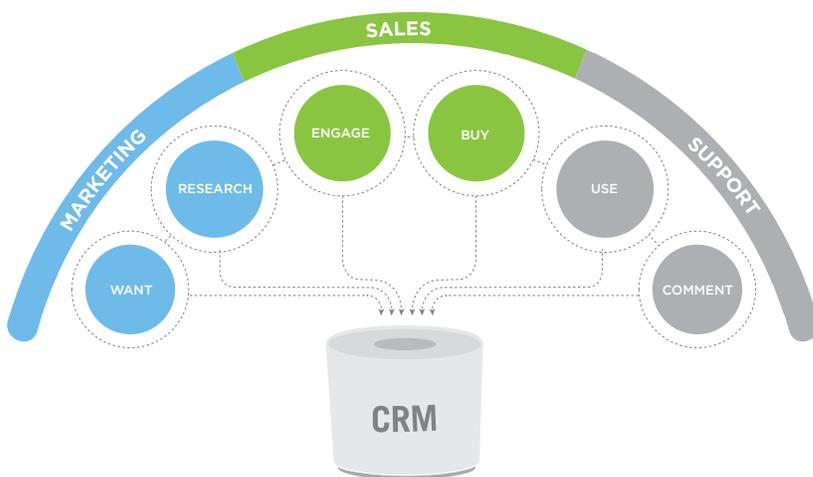
COLLECT   **CENTRALIZE**   **ACT**

SURVE empowers you to:

- **Improve your sales pipeline** by automatically creating new leads in Salesforce from SURVE surveys and forms.

- **Increase marketing campaign effectiveness** by building more engaging surveys and landing page forms.

- **Streamline your help desk** by integrating customer support data directly into Salesforce.

SURVE capabilities:

- Rapidly build surveys, scripts, and forms without the need for technical resources.

- Collect information in a number of ways including web pages, custom buttons or links within any Salesforce object, SURVE email deployment, or Salesforce emails *(either manually via templates or automatically via Salesforce workflow)*.

- Automatically update Salesforce records, including custom objects and fields.

- Control CRM synchronization manually or automatically, with the ability to select and edit responses before synchronizing.

- Save time by scheduling surveys to send automatically from Salesforce.

- Maximize the robust reporting capabilities of Salesforce with integrated data from SURVE. Or, use advanced reporting to create executive dashboards and reports.

- Close the loop on actionable responses by automatically alerting the appropriate resource*(s)*.

ABOUT CLICKTOOLS

Clicktools develops cloud applications that integrate with CRM to help businesses better understand and serve their customers. Since 2001, companies have relied on Clicktools' flagship offering, SURVE, the premium survey software for business, to integrate customer feedback in CRM. Syncfrog, Clicktools' low-cost, intelligent data loader, empowers non-technical users to centralize data from multiple cloud applications. Clicktools is owned by Callidus Software Inc. (NASDAQ: CALD), which operates as CallidusCloud®, the leading provider of sales and marketing effectiveness software.

Learn more about SURVE & Salesforce.

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surve
built by CLICKTOOLS