

Bluewolf Partners with Clicktools to Power “*The State of Salesforce*” Data Collection



Many of Bluewolf’s clients use Salesforce, the customer success platform, to engage their customers and grow their business. To help their clients learn how the best companies use Salesforce, Bluewolf’s Corporate Marketing Team surveys Salesforce customers from around the world and uses that data to produce a report entitled *The State of Salesforce*.

History of the State of Salesforce

When the Bluewolf Corporate Marketing Team first launched *The State of Salesforce*, they used a standalone survey solution to collect responses. Over time, the goals and focus of the report expanded, as did their need for a more sophisticated survey tool. Jonathan Staley, a Product Marketing Manager at Bluewolf, recalled, “We knew we needed a more robust survey solution. Dynamic question types in addition to the ability to conduct quick data analysis and reporting were essential. Clicktools is one of Bluewolf’s partners, so aligning with them on a more powerful solution was a natural fit.”

In 2013, the Bluewolf Corporate Marketing Team enlisted the support of Clicktools professional services team to build a more sophisticated survey using SURVE, the premium survey software for business built by Clicktools. SURVE enabled conditional questions based on job function and other demographics. The reporting made cutting the data in various ways and cross-tabbing to analyze segments, such as respondents’ roles and company size, significantly more efficient than it had been before.

Taking SURVE into Their Own Hands

After a successful run with their first SURVE survey, The Bluewolf Corporate Marketing Team opted to take

ABOUT BLUEWOLF:

Bluewolf is a global business consulting firm that helps customer-obsessed enterprises transform their business. With 14+ years of cloud computing expertise, Bluewolf’s award-winning strategic consulting, implementation, change management and learning, and cloud management services rapidly innovates business processes and technologies to drive digital customer experiences and accelerate business outcomes. Bluewolf has offices in North America, Europe, and Asia-Pacific and has worked with companies in more than 25 countries globally.

CHALLENGES:

- Replace standalone survey application that required responses to be analyzed in spreadsheets.
- Expand the scope and complexity of the *State of Salesforce* survey to include dynamic questions, such as conditional questions and pre-populated fields.
- Eliminate time-consuming tasks associated with feedback management from partners, such as manually tracking responses by partner and by segment.

SOLUTION:

- Implement SURVE to power the *State of Salesforce* data collection and analysis.
- Automate response tracking to manage and analyze all survey data within SURVE.
- Increase efficiencies for the Bluewolf marketing team, enabling them to build, manage, and report on a more complex survey in less time.

the 2014 report into their own hands. Starting with the framework from their 2013 SURVE survey, they built the new one on their own, pulling questions and logic from the previous year. They also took a role specific approach for the first time, tailoring question groupings by job function. They asked sales, marketing, services, and IT questions geared toward their area of expertise to produce results that would be more meaningful to individual departments.

invite their customers to take the State of Salesforce survey. Using simple tracking features native to the SURVE application, Bluewolf was able to track which partners were having success and contributed responses, as well as those which needed additional support. This made it much easier than previous years to manage day-to-day partner activities. SURVE reporting enabled the Bluewolf Corporate Marketing Team to see where they needed to target to generate additional data from certain functions or industries.

“SURVE allowed us to expedite the data collection and analysis of our 2014 survey, and effectively manage responses quicker than previous years. Team members could conduct data analysis in one place, using their own views and filters.”

— Jonathan Staley, Product Marketing Manager, Bluewolf

“SURVE allowed us to expedite the data collection and analysis of our 2014 survey, and effectively manage responses quicker than previous years,” said Staley. “Team members could conduct data analysis in one place, using their own views and filters.” To increase their survey population, the Bluewolf Corporate Marketing team also asked partners to

“Using what we’ve already built and learned with Clicktools, we look forward to the possibility of working with them again on future projects. Their partnership and solution allow us to focus on the research we want to conduct and not worry about the limits of a solution or increasing the daily workload on our team,” said Staley.

ABOUT CLICKTOOLS

Since 2001, Clicktools has developed cloud applications that integrate with CRM to help businesses better understand and serve their customers. Hundreds of companies rely 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. The company is headquartered in Poole, England, UK with US offices in Phoenix, Arizona. Clicktools is owned by Callidus Software Inc. (NASDAQ: CALD), which operates as CallidusCloud®, the leading provider of sales and marketing effectiveness software.

Contact us today
for a FREE demo.

US: 1-800-774-4065 | UK: 0800 0432587
sales@clicktools.com | www.clicktools.com

surve
built by CLICKTOOLS