

Pitney Bowes Business Insight increases its Net Promoter Score® by 30 points using Clicktools integration with Salesforce



Pitney Bowes Business Insight is a software and services company that helps organizations to acquire, serve and grow relationships with customers and citizens. The firm's suite of customer communications management solutions integrates data management, location intelligence, sophisticated predictive analytics, rules-based decision making and cross-channel customer interaction management to increase the value of every customer communication while also delivering operational efficiencies.

The Story

When Pitney Bowes Business Insight (PBBI) began using Salesforce in 2009, it was imperative to find a survey solution that offered integration with the popular CRM. PBBI was also looking for a survey provider which did not require several weeks for a consulting team to modify content each time they needed to change a survey question.

"It was extremely expensive and time-consuming," said Marilyn Otto, Vice President of Customer Experience at PBBI. "We're sending out over 25,000 survey invitations a year, dispersed between 11 unique surveys. We really needed the ability to create and edit our own surveys and make changes on the fly."

PBBI worked with a consulting firm that did an extensive review of all the major survey tools on the market. Clicktools reputation as the #1 survey tool on Salesforce.com's AppExchange as well as its easy to use survey builder, work-flow deployment, multiple language and real-time updates functionality were key factors in the decision.

"We looked at all the major survey solution providers, and Clicktools offered the best solution to meet all our requirements. We can now modify survey content instantly."

MARILYN OTTO

Vice President of Customer Experience at PBBI

CLIENT:

- Pitney Bowes Business Insight

CLICKTOOLS PRIMARY USE:

- Relationship (NPS®) & Transactional Surveys

CHALLENGE:

- Find a cost effective self-service survey platform that integrated with Salesforce

MAIN WINS:

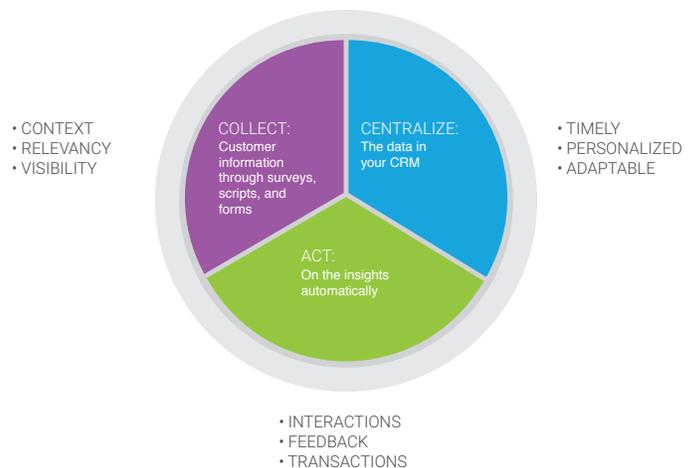
- Changed the overall culture to be more "customer-centric" focused
- Saved over \$300,000 on platform and consultancy costs
- Increased Net Promoter Score® by 30 points in 3 years

"The entire PBBI organization is now in a proactive versus reactive mode. Everyone is thinking about the customer first," Marilyn stated. "Clicktools helped us create an overall cultural shift when it comes to customer experience."

PBBI's use of Clicktools and its integration with Salesforce, gave them the tools they needed to track and monitor their Net Promoter Score® and notify sales teams in real time if a customer responded to a relationship or transactional survey as a Detractor. Survey responses and comments are instantly integrated and uploaded into Salesforce. Account managers are able to review customer feedback directly in Salesforce and create reports to share with functional teams globally. PBBI uses Clicktools to identify key drivers of loyalty using Clicktools Analytics. These combined capabilities gave PBBI the tools they needed to leverage customer insight to drive corporate action and improve their Net Promoter Score® by 30 points.

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CUSTOMER EXPERIENCE FLOW



ABOUT CLICKTOOLS

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, Clicktools, 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.

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