

## Vaillant Group UK Uses Clicktools to Manage & Respond to Feedback from Customers and Employees



As one of Europe's leading heating technology manufacturers, Vaillant Group UK upholds a culture of "thinking ahead." The company's products feature high energy efficiency ratings and low emissions, and come with an enviable reputation for performance, quality, and reliability. It makes perfect sense that they endeavored to apply this ingenuity to their service customers and employee feedback programs, as well.

As part of an effort to reduce or eliminate manual tasks related to customer feedback, the company sought a solution to automate how they sent, responded to, and reported on customer satisfaction surveys. Additionally, they wanted better insight into call outcomes in the support department and a clearer understanding of employee satisfaction, particularly in the face of frequent change. To manage all of these improvements, they planned to leverage Salesforce as the hub for information and analysis.

### Effortless customer satisfaction surveys & processes

Prior to discovering Clicktools, recording customer satisfaction and establishing a Net Promoter Score (NPS)<sup>®</sup> required significant time and resources. In fact, a staff member had to manually wade through large amounts of data and calculate a score by hand. Because this was time-consuming and potentially prone to human error, the Vaillant service team wanted a quick and automatic way to improve this process.

The company chose Clicktools and quickly used it to replicate their existing customer satisfaction survey. To send the Clicktools surveys, they constructed an automatic job within Salesforce to verify that the customer wished to receive a survey. If yes, it was emailed.

### ABOUT VAILLANT GROUP UK

Vaillant Group UK is the UK's leading heating technology manufacturer and owner of the Vaillant and Glow-worm brands. Proud to be part of the worldwide heating and hot water corporation Vaillant Group who has presence in over 20 countries with national sales companies and exports to more than 60 states, the Vaillant Group is an international family-owned company with a heritage of more than 135 years in providing customers with energy-saving and easy to operate solutions for heating, cooling and hot water.

### CHALLENGES

- Reduce or eliminate manual tasks related to customer feedback management.
- Improve time-consuming process of sorting through data to calculate NPS.
- Gain better insight into call outcomes in the group services department.
- Get clearer understanding of employee satisfaction and reaction to process and technology changes.
- Leverage existing Salesforce solution to gain better insights into customer needs and satisfaction levels.

### SOLUTION

- Implemented Clicktools to completely eliminate manual tasks associated with gathering and analyzing customer feedback.
- Automated the collection and calculation of NPS, adding it directly to the Salesforce Account record.
- Created a Clicktools call script to track progress and outcomes of customer calls.
- Built an anonymous staff survey to measure and improve change-management across the company.
- Centralized all feedback from customers and employees in Salesforce for one-stop access, analysis, and reporting. based on Clicktools reporting.

*“The Clicktools customer satisfaction survey gives us a better understanding of our customers and their likes and dislikes.”*

— Elizabeth Parker, Call Agent, Vaillant Group UK

For the first time in company history, this survey was fully integrated with Salesforce, so that no manual tasks had to be performed for responses and analysis to be available in CRM.

Elizabeth Parker, Call Agent for Vaillant noticed: “The Clicktools customer satisfaction survey gives us a better understanding of our customers and their likes and dislikes.”

They also added a NPS object into the Account objects in Salesforce to receive customer responses. Clicktools automatically calculates the score and places it on the Account object, allowing reporting and quick evaluation of average results – without the need for someone to manually add it up! They were one of the first countries within the Vaillant Group to incorporate this entire process into Salesforce.

#### Call scripts to streamline support processes

As part of this broader feedback initiative, management wanted greater understanding of call outcomes in the service team. This would enable strategic changes to key points in the customer journey.

Rather than diving into spreadsheets, reports, and countless hours running formulas, they instead used Clicktools to create a call script form that allowed agents to track progress and outcomes during calls.

Constructing the script was simple. Fortunately, the agents found usage even simpler, giving extremely positive feedback as they began following the script during calls. The program began as a trial with just a single team, but it

enabled clear results, recording more than 460 outcomes. After two weeks of trials, Vaillant had established enough groundwork to deploy to the whole call centre. They began to collect a wealth of information daily on customer outcomes, call results, policy sales, and more. The company recorded the outcomes of 17,258 calls using Clicktools during the first four weeks of use.

#### Employee satisfaction matters too

Since 2012, the service team experienced a wave of IT and process improvements to facilitate business, make staff lives easier, and expand the Salesforce platform. Ranging from software updates to telephony integration, management was well aware that any type of change can cause stresses and concerns for staff members.

As such, they again relied on Clicktools to build an anonymous staff survey to monitor the affect of these changes, evaluating expectations, feelings, impact on performance, and any negative effects on moral.

Clicktools allows Vaillant to quickly create new surveys, post them for use, and effectively collect and review all feedback. It enables management to view top and low scores, and what changes have had the most drastic effects. They can also gauge staff feelings and concerns to improve the change-management experience and better prepare for next time.

Duncan Roe, Inbound Team Leader, commented, “Since the surveys are anonymous, they offer an excellent tool for open and honest feedback. They give a better understanding of how changes affect the customer journey.”

#### 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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