CLICKTOOLS WITH SALESFORCE

Salesforce® Integration

Clicktools 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 for five consecutive years, Clicktools clearly lives up to its reputation for powerful functionality, great value, and unmatched support for Salesforce users.

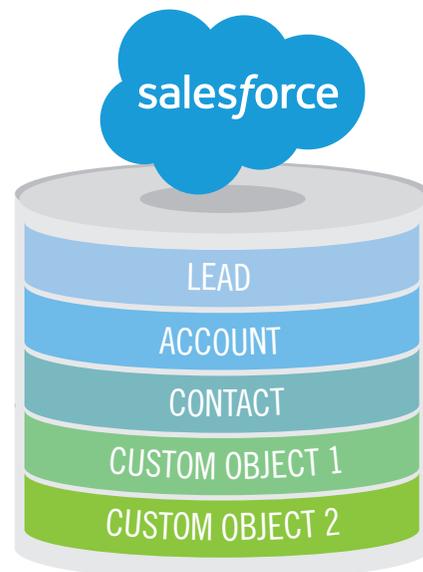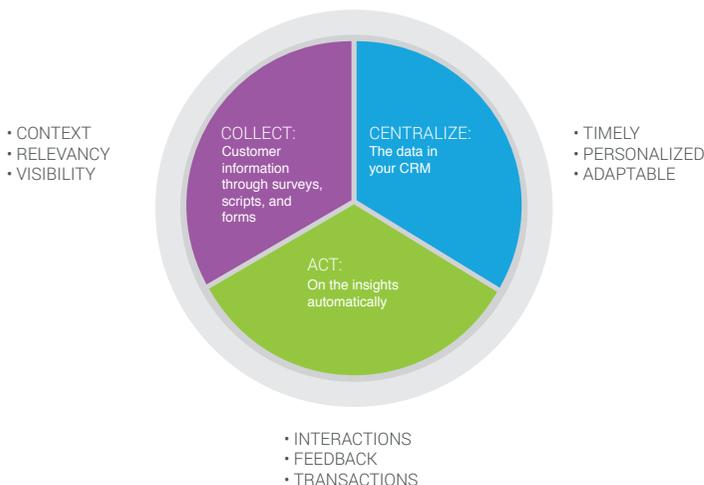Clicktools and Salesforce seamlessly integrate, enabling organizations to:

- **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.

The Clicktools Difference: Tight CRM Integration

Since the very beginning, Clicktools has enabled marketing, sales, and support professionals to integrate customer feedback into 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.
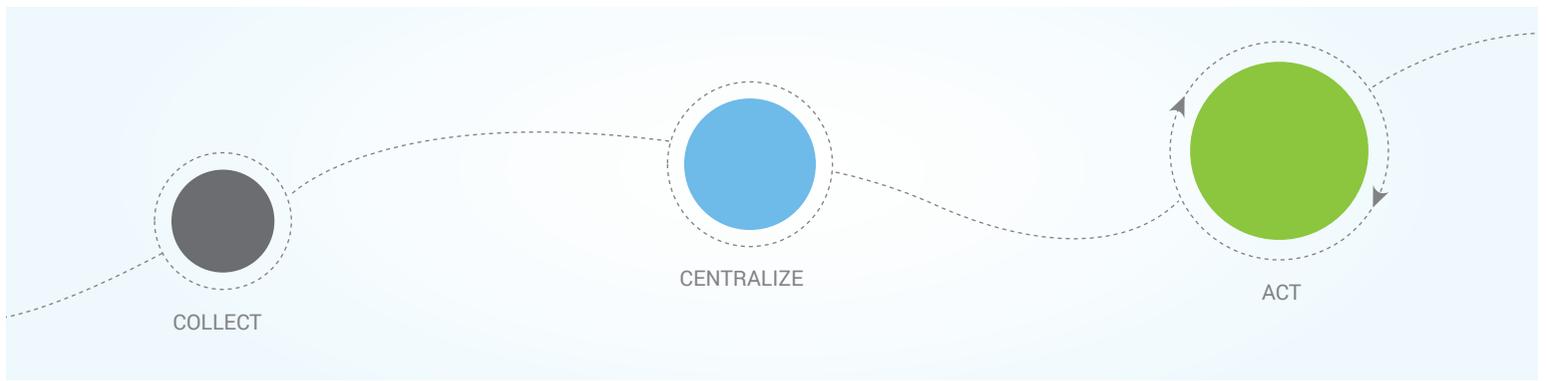
CUSTOMER EXPERIENCE FLOW

- CONTEXT
- RELEVANCY
- VISIBILITY

COLLECT: Customer information through surveys, scripts, and forms

CENTRALIZE: The data in your CRM

ACT: On the insights automatically

- TIMELY
- PERSONALIZED
- ADAPTABLE

- INTERACTIONS
- FEEDBACK
- TRANSACTIONS

salesforce

LEAD

ACCOUNT

CONTACT

CUSTOM OBJECT 1

CUSTOM OBJECT 2

DID YOU **KNOW**

SALESFORCE NAMED CLICKTOOLS

"1 of 3 Customer Service Apps to Try in 2016"

COLLECT   CENTRALIZE   ACT

Clicktools empowers you to:

- Improve your sales pipeline by automatically creating new leads in Salesforce from Clicktools 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.

Clicktools 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, Clicktools 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 Clicktools. Or, use advanced reporting to create executive dashboards and reports.

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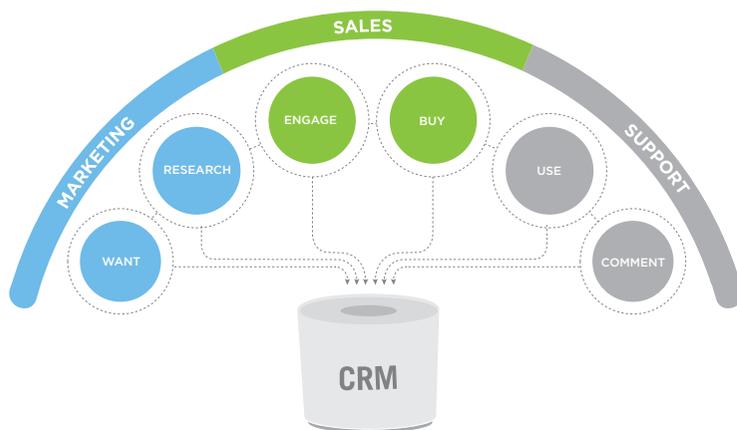
MARKETING   SALES   SUPPORT

WANT   RESEARCH   ENGAGE   BUY   USE   COMMENT

CRM

ABOUT CLICKTOOLS

Clicktools solutions help organizations transform customer experience to consistently drive improvements and profits. The company's flagship software, Clicktools, enables companies to collect, centralize, and act on customer feedback using surveys, call scripts, and web forms that integrate with CRM. 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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