

## FinancialForce Uses Clicktools to Expand their Feedback Program



FinancialForce helps customers run more efficiently with a full suite of solutions for ERP, financial management, supply chain management, quote to cash, and more. The company's high standard for speed and performance applies to their cloud solutions and to their own internal pace as an organization. As such, it's imperative to respond quickly to individual customer feedback and to analyze input from a strategic level as well.

When they first began surveying customers, they used a standalone system that did not integrate with Salesforce and required a lot of manual steps even to run a simple survey. They had to export the survey contacts from Salesforce, manipulate the data in a spreadsheet, and then upload the list to the application for deployment. Plus, the application only allowed a limited number of contacts and did not enable filtering, so these tasks had to be repeated for nearly every survey and whenever any data in Salesforce changed.

Even more problematic was the fact that the responses were kept separate from CRM records and could not be efficiently acted upon within the Salesforce environment.

The entire process took far too much time and effort, so FinancialForce began to look for an alternative solution. They chose to compare Clicktools with another leading solution, ultimately selecting Clicktools because of its ease-of-use and deep integration with Salesforce, a FinancialForce technology partner and critical system for the company.

Addy Clark, Manager of Customer Success for APAC and EMEA, recalled, "We really liked the ease of integration with Salesforce and that we didn't need IT to get up and running. The other solution we considered required much more administration from a technical standpoint."

### ABOUT FINANCIALFORCE:

FinancialForce delivers ERP at Customer Speed™. Built on the Salesforce1 Platform, FinancialForce ERP equips customer-centric businesses with a unified cloud platform and all the applications necessary to grow both the top and bottom line. The company's Financial Management, Human Capital Management (HCM), Professional Services Automation (PSA), and Supply Chain Management (SCM) apps allow businesses to increase the speed in which they operate and be more responsive along every touch point of a customer's journey. Founded in 2009 and headquartered in San Francisco, FinancialForce is backed by Salesforce.com, UNIT4, and Advent International.

### CHALLENGES:

- Replace standalone system that did not integrate with Salesforce.
- Automate flow of data from customer experience surveys into CRM records.
- Eliminate administrative tasks associated with gathering customer feedback.
- Enable customer-facing staff to collect and respond to feedback within Salesforce.

### SOLUTION:

- Implement Clicktools to integrate customer feedback in CRM.
- Improve service by connecting all customer feedback efforts to Salesforce records.
- Expand feedback program to include closed case and post-implementation surveys.
- Integrate Clicktools web form into contact records to capture input from customer meetings.

## A Fast Start with Clicktools

The FinancialForce team quickly embraced the point-and-click mapping capabilities, setting up their first customer experience survey right away with results flowing directly into Salesforce. Since this survey only ran twice a year and required no manual intervention, they found time to expand their use to collect other kinds of customer feedback, including closed case and post-implementation surveys.

FinancialForce also began to get creative with Clicktools web forms for internal use. They built a Clicktools link into each Salesforce contact record that customer service agents can click to open during a customer meeting. This Clicktools form captures notes and other customer input, and automatically schedules a follow-up meeting and

## Earning Loyal Customers with Feedback in CRM

The company's feedback capabilities have increased dramatically as they've taken advantage of sophisticated functionality such as conditional surveys and answer piping from Salesforce data. This enables them to tailor the experience to each customer's situation and to provide better, more context-based service.

They've also leveraged Clicktools' security features, such as setting permissions by user, to protect HR and other sensitive data from being breached within the organization.

"Although our feedback program relies on sophisticated functionality, we continue to appreciate the ease-of-use of the system," Clark commented. "I taught a new employee how to build and deploy a Clicktools survey in an hour."

*"The time savings are immeasurable. With a single click, Clicktools automatically updates multiple Salesforce records so that appropriate actions can be taken, including tasks and reporting across the organization."*

— Addy Clark, Manager of Customer Success for APAC and EMEA, FinancialForce

tasks. At the close of the meeting, the agent submits the form, which instantly updates the account, contact record, and tasks.

"The time savings are immeasurable," said Clark. "With a single click, Clicktools automatically updates multiple Salesforce records so that appropriate actions can be taken, including tasks and reporting across the organization."

support team. These experiences have proven to be extremely positive. In one particular case, the support team even held a training for FinancialForce staff and launched a program for Addy Clark while she was on holiday.

"The support has been unreal," she said. "I'm super impressed with the effort they put into my project when I wasn't even there!"

While ease-of-use and time savings have topped the list of benefits since FinancialForce switched to Clicktools, they have had times when they needed to reach out to the Clicktools

## 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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