Think Clicktools is a great survey solution? Well, you’re right. But it’s also much more than that. Clicktools customers use the platform across a variety of departments and functions. Here are some examples of creative ways that you might use Clicktools.

**Marketing**

**CAMPAIGN LANDING PAGES**
Capture details of a new lead from a website, social media or an e-book. Don’t use leads, then create an account, contact and opportunity instead. Clicktools Smart Mapping can check to see if the lead already exists and update it and the lead score appropriately.

**EVENT REGISTRATION**
Make it easy for people to register for your events. Link to different exit pages to provide further information based on their responses. Automatically update campaign member status and contact information in CRM.

**RESOURCE REQUEST**
Track who is downloading valuable content and let Clicktools Smart Mapping do the heavy work of updating the appropriate records in CRM.

**OPT-IN PREFERENCES**
Ensure you are compliant with direct marketing and CAN/SPAM rules with a simple link in any email.

**PARTNER MANAGEMENT**
Capture details of new partners and make it easy for them to register their leads. Use Clicktools Smart Mapping to trap duplicate leads and Actions to alert a partner manager to ensure prompt follow-up of new business opportunities.

**Sales & Account Management**

**WEB TO LEAD**
Have links to Clicktools forms in your outbound campaigns create or update anything in CRM thus automating the progressive profiling of leads or opportunities.

**OUTBOUND CALL SCRIPT**
Maximise the success of your inside sales by providing scripts that hit the key points of your value proposition. Personalise content by pre-populating the script with information from your CRM. Save time by using the script to update any information in CRM and initiate follow up actions using Clicktools Smart Mapping.

**SALES QUALIFICATIONS**
Save sales people’s time by capturing essential information about opportunities from the customer directly. Automatically trigger requests for updates at points in the sales cycle with requests that are prepopulated with known information. Use the information to update the opportunity status where appropriate.

**Operations & Service**

**PROJECT IMPLEMENTATION FORM**
Use a Clicktools form to collect product configuration or project requirements.

**HELP DESK SCRIPTS**
Help your agents deliver great service with inbound scripts that cover a range of products, scenarios and languages. Use routing built into Clicktools to ensure that only relevant questions are asked and present information to the agent to help them resolve the customer’s problem. Update CRM with selected data from the script to help identify product issues and track call center performance.

**WEB TO CASE**
Automatically create a case from a form on your website, Facebook page or within a software application. Want to encourage self-service: use exit pages to re-direct to a FAQ page and only create the case if the problem is not resolved.
BUSINESS PROCESS FORMS
Simplify your processes, whether managing a research grant application process, collecting product configurations or running medical trials. Use the power and flexibility of Clicktools forms integrated with CRM to ensure you get the right data, in the right place, at the right time.

IDEA CAPTURE
Capture product and process ideas through a Clicktools form on your web site, intranet or social network. Include picklists to categorise the suggestion, making analysis easier. Ideas captured can be populated directly into CRM.

RECRUITMENT
Use Clicktools to capture candidate information including resumes from links in intranets, job sites and social media. Build tests using Clicktools to help you screen applicants.

SOCIAL MEDIA
Place Clicktools forms or surveys on Facebook, LinkedIn, Pinterest or other social media to give your customers another way of sharing their views. Capture their ID (with permission) and use this to associate the feedback with their record in CRM.

And Of Course Surveys

WIN/LOSS SURVEYS
Learn more about customer’s buying decisions and use the data to improve your sales performance. Include a stay in touch option so that you can continue to send material of interest.

COMPLAINT CAPTURE
Well-managed complaints can turn a disgruntled customer into an advocate. Make it easy for customers to complain with links in a website, social media or an electronic document. Use automated alerts to drive prompt responses.

EVENT BASED SURVEYS
Capture feedback at all the key interactions with your customers. Use CRM workflow to automatically trigger the surveys and Clicktools Smart Mapping to drive results and actions back into CRM. Personalize the survey using CRM data to improve response rates and update survey counts to manage survey toxicity. Use CRM and/or Clicktools dashboards to automate role relevant reporting leaving you to focus on generating insights and driving improvements.

CSAT/NPS SURVEYS
Understand the strength of your relationship with customers through periodic or continuous surveys that are simple to deploy. Automate reporting in Clicktools and/or CRM. Generate email alerts or create a case to identify any dissatisfied customers and implement service recovery. Associate survey results with CRM contacts and accounts to guide staff in their interactions with customers.

PROJECT SURVEYS
Get a clear view of how customers rate your professional services with an end of project survey. Better still, use milestone surveys to give you time to address any issues.

CLOSED CASE SURVEYS
Identify issues of agent and process performance with automatically triggered surveys. Update the case record in CRM with satisfaction scores or even re-open and escalate the case if the customer reports dissatisfaction using Clicktools Smart Mapping.

EMPLOYEE SURVEYS
Run your employee survey in Clicktools and provide Clicktools reporting to provide automated reports by business unit, team, department or any other demographic you choose.

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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