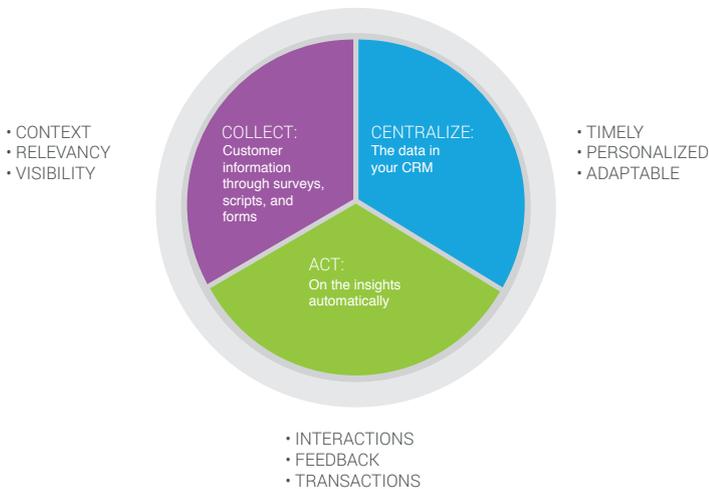## The Power of
CLICKTOOLS & SugarCRM

SugarCRM® Integration

Unleash the full power of Clicktools by integrating it with SugarCRM. By adding feedback data to your CRM records, customer feedback can be seen and responded to instantly through automated workflows and when needed, higher touch, personal communications. Your teams will appreciate easy access to customer insights within the SugarCRM environment, where they work every day. Management will love the reporting and analytics capabilities that display real-time measurement of customer satisfaction, loyalty, experience, and any other metrics you wish to track.

Clicktools and SugarCRM seamlessly integrate to enable your company to:

- **COLLECT** feedback through surveys, call scripts, and web forms.
- **CENTRALIZE** all of the data you've collected in SugarCRM.
- **ACT** on feedback to improve customer engagement and experience.
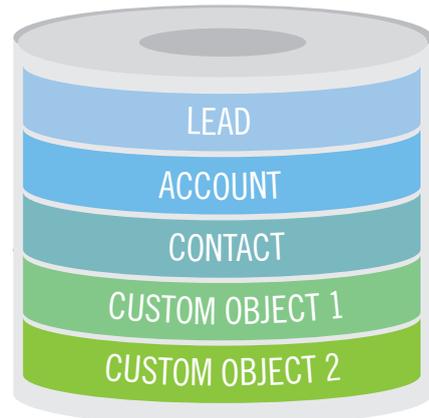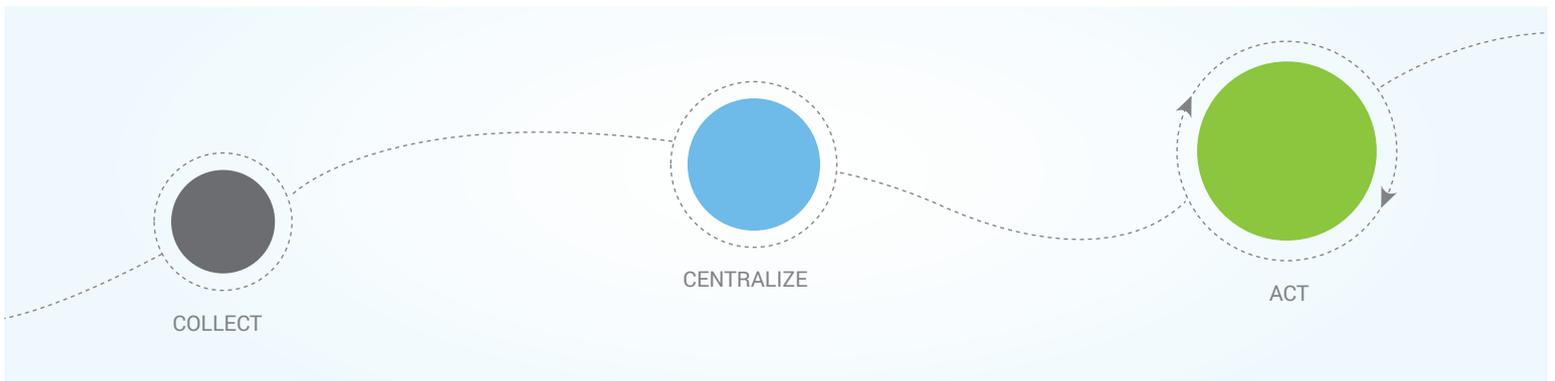
The Clicktools Difference: Tight CRM Integration

Since the very beginning, Clicktools has enabled customer-facing professionals to leverage customer feedback via their CRM solution. The result is a smooth and seamless flow of information from fully customizable surveys, dynamic call scripts, and interactive forms to anywhere in your CRM.
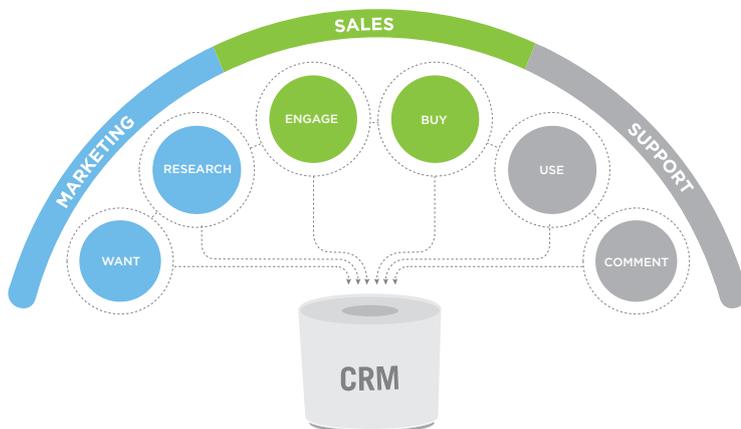
Across your organization, personnel have instant access to valuable insights that enable them to serve customers better. Plus, many of these interactions can be automated for hands-off, highly efficient improvements to customer experience.

SUGARCRM.

LEAD
ACCOUNT
CONTACT
CUSTOM OBJECT 1
CUSTOM OBJECT 2

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

COLLECT

CENTRALIZE

ACT

Clicktools empowers you to:

- Improve your sales pipeline by automatically creating new leads in SugarCRM 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 SugarCRM.

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 CRM object, Clicktools email deployment, or SugarCRM emails (either manually via templates or automatically via SugarCRM workflow).

- Automatically update SugarCRM records, including custom modules and fields.

- Control CRM synchronization manually or automatically, with the ability to select and edit responses before synchronizing.

- Maximize the reporting capabilities of SugarCRM with integrated data from Clicktools. Or, use Clicktools' advanced reporting to create executive dashboards and reports.

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

Contact us today for a FREE demo.

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