

MaritzCX for Salesforce

Drive Positive Customer Experiences with Voice of the Customer Data in Salesforce

Getting Voice of the Customer (VoC) data into the hands of the right people in your organization can be a game-changer in driving positive customer experiences. Imagine if your sales and support teams had access to critical VoC data within Salesforce every time they reviewed a customer's account.

With MaritzCX for Salesforce®, you can easily integrate customer experience (CX) data directly into Salesforce, putting key insights and information at the fingertips of your sales and customer support specialists, where they need it, when they need it.

HOW VOC DATA IN SALESFORCE REDUCES CHURN AND BOOSTS CUSTOMER SATISFACTION

By integrating VoC data with Salesforce account and contact information, your customer-facing teams can take immediate action on relevant data. For instance, account representatives can view all feedback before they contact him or her about an account renewal. Armed with that critical information, the account representative can tailor the conversation appropriately.

The system also helps to proactively 'close the loop' by triggering cases that need an account manager's follow up. Account managers are automatically notified, using existing Salesforce workflows, if they need to reach out to a low performing account so they can assess next steps. By contacting the customer proactively, you build goodwill, reduce churn, and improve satisfaction.



Benefits of MaritzCX for Salesforce

- **Identify revenue at risks and sales opportunities** by viewing VoC data within Salesforce.
- **Close the loop for at-risk accounts** with triggered cases that use existing Salesforce workflows.
- **Pinpoint customer feedback trends** with Salesforce dashboards.
- **Jumpstart your program** with lower administrative costs and speedy self-serve setup.
- **Gain deep customer insights** by viewing all responses for a contact or account. This historical view of a customer's responses gives a sense of how they've reacted over time, and allows account managers to take appropriate action.

DRIVE QUICK ACTION WITH VISUALIZATIONS

Native dashboards in Salesforce combine survey responses from MaritzCX with business data from Salesforce to sense problems, drive quick action, and increase revenue or reduce churn risk. In a single view, account managers and sales executives can view at-risk contacts and accounts and take proactive action within Salesforce.

LINK CUSTOMER METRICS WITH SALESFORCE DATA FOR 360° VIEW

MaritzCX sends key customer metrics to Salesforce including Net Promoter Scores and Overall Satisfaction. This data is updated each time new survey results are available, and it can be analyzed in any Salesforce report. By reporting on customer metrics in conjunction with Salesforce’s revenue and marketing data, your sales and support teams get a complete picture of their impact on customer feedback.

PROACTIVE, CLOSED LOOP FOLLOW-UP WITH CASE MANAGEMENT

Use your existing Salesforce case management and assignment workflows to immediately create cases on low-performing or dissatisfied accounts and prompt an immediate follow-up. An integrated case view gives account managers VoC data alongside customer history which lets them assess next steps and take appropriate actions. Real time posts to Chatter notify account managers when a new case is created and assigned so they can react quickly.

EASY ADMINISTRATION AND ONGOING MAINTENANCE

Get started by downloading the MaritzCX Salesforce app from the Salesforce App Exchange; just execute the one-click install to begin the installation process. Ongoing administration and maintenance is minimized, because self-serve “connectors” automatically update Salesforce with new customer survey data. The Salesforce administrator doesn’t need to be involved in this process, which reduces administration costs and saves time.

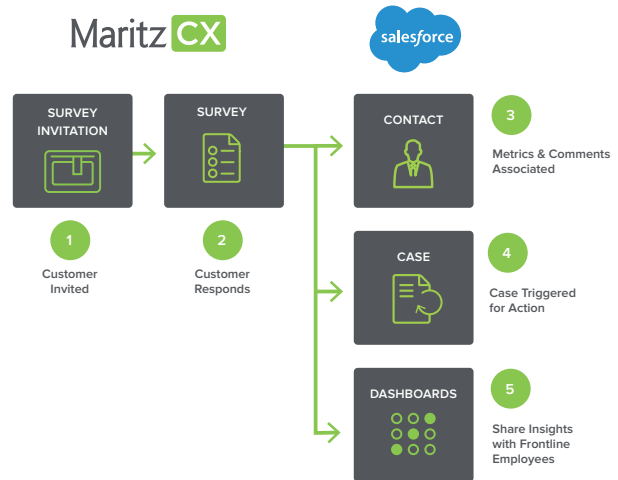


Figure 1: MaritzCX for Salesforce Workflow: VoC data, such as customer metrics and comment data, is pushed to Salesforce and associated with Salesforce accounts and contacts.

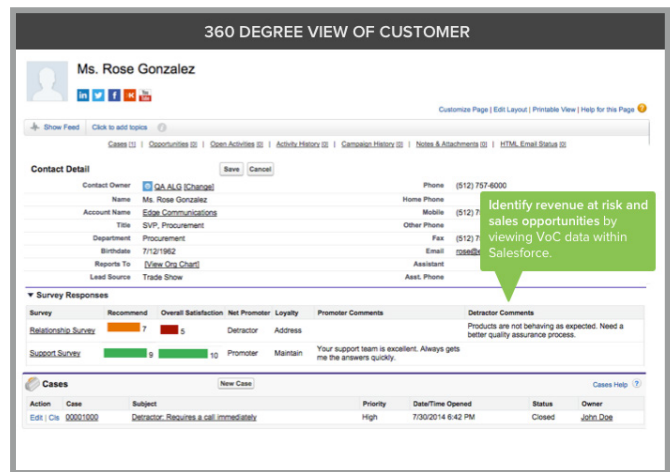


Figure 2: VoC information is displayed on the same screen as Salesforce account information, so sales and support teams can take immediate, proactive action to drive positive customer experiences.

To demo a product or to contact MaritzCX sales, call **385.695.2800**

MaritzCX believes organizations should be able to see, sense and act on the experiences and desires of every customer, at every touch point, as it happens. We help organizations increase customer retention, conversion and lifetime value by ingraining customer experience intelligence and action systems into the DNA of business operations. MaritzCX is the combination of the Allegiance award-winning CX platform and Maritz Research strategic consulting services. **For more information, visit www.maritzcx.com.**

WWW.MARITZCX.COM