

FACT SHEET

# Confirmit CRM Connector for Salesforce

Optimizing Customer Interactions Throughout the Customer Lifecycle



## AS A VOC ANALYST, I WANT TO...

- Use customer information stored in Salesforce to send out tailored survey invitations
- Push account and contact data from Salesforce to Confirmit Horizons so I can report on it together with transactional data collected within my VoC program

Each and every customer interaction is important to your business, and you know how critical it is to listen to, and act on, the Voice of the Customer.

With Confirmit CRM Connector for Salesforce, you can optimize all your customer interactions throughout the customer lifecycle, by integrating Confirmit Horizons directly with your Salesforce system.

## Solutions for Sales and Services

Whether you sell to businesses, consumers or both, you have multiple customer touchpoints throughout the customer lifecycle. Integrating your VoC program with your CRM system enables you to optimize all these different touchpoints, from both your customers' and your business perspectives.

- 01 As part of your initial customer on-boarding process,** and with every significant Salesforce transaction that follows, initiate a VoC transactional survey to capture feedback on the customer experience
- 02 Select customers from Salesforce** for regular relationship feedback, and use Confirmit Horizons to manage the business rules for distributing the surveys
- 03 Trigger surveys after each service interaction,** and use business rules in Confirmit Horizons to generate activities for sales or cases for services to follow up
- 04 Leverage key customer data** from Salesforce to deliver contextual information about your customers into your business reporting and executive dashboard.

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## Optimized Experience for Customers

Don't frustrate customers by asking questions to which you already know the answer.

By integrating your VoC and CRM solutions, the relevant data is automatically available. This ensures that the survey is targeted to the specific environment of the customer – streamlining the process, and showing that you value them.

Similarly, you can create highly targeted customer lists to enable you to ask very specific, valuable questions. For example, you can focus on resolving localized issues – such as delivery problems that affected only customers who bought a particular product in a single region during a defined period of time – and find out exactly how the situation impacted them, and what you need to do to keep their business in future. Or build lists of customers who are coming to the end of their contract with you, and gain valuable feedback about their intention to renew while you are still able to impact that decision.

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## Optimized Experience for Business Users

There are many different profiles of users for an integrated CRM and VoC solution.

In a B2B environment, along with your VoC team, you will have marketing teams, new business sales and account management teams, and services and support teams all undertaking different forms of customer interaction.

With the enterprise capabilities of Confrimit Horizons, it isn't necessary for all users to have access to the CRM system, which can be prohibitively expensive. Confrimit Horizons users do not need end user access to the CRM system to pull sales and services information and deliver the required surveys, reports, dashboards and action management programs to fulfil their job function.

The flexibility of the integrated solution ensures the right kind of access for different business users. For example:



**Sales** teams may want to work mainly in Salesforce, while VoC and marketing teams need access to both systems



**Business** users outside these domains will probably only need access to Confrimit Horizons.



**Services** teams that use Salesforce for case management will work in Salesforce





## Optimized Customer Interactions

All this requires an enterprise-capable VoC solution that is tightly integrated with a CRM system such as Salesforce.

When users access their business reports, executive dashboards and business applications, they should always see the most up-to-date and relevant customer interaction data, whichever solution they work with. It should also be easy to configure and manage the integration without always having to draw on resources from the VoC software vendor. Confirmit CRM Connector for Salesforce delivers all of this, so you can ensure that your customers get the best experiences possible.

### 01 Account Managers

Want to see the latest KPI scores – satisfaction, NPS®, etc. – from their customers and their contacts

### 02 Voice of the Customer Teams

Require actions triggered within Salesforce to close the loop on issues raised by customers

### 03 Services Teams

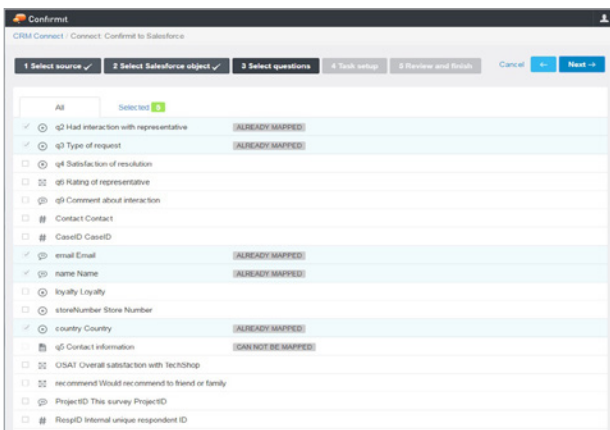
Need cases automatically created for them when customers flag product or service issues, and they want to see the current context of the account when responding to a service issue

### 04 Business Executives

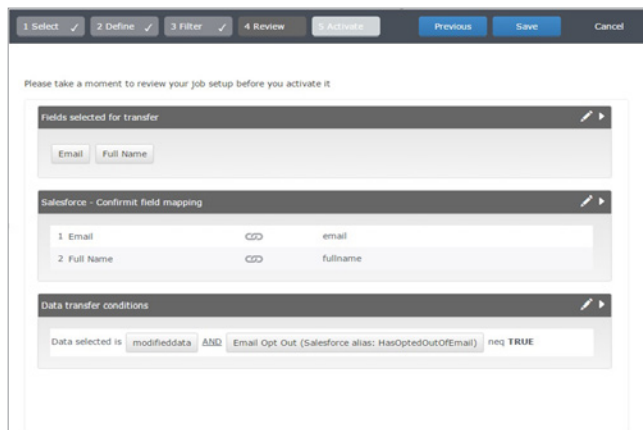
Must have dashboards to intelligently analyze key customer metrics alongside the VoC feedback to identify the most important drivers of satisfaction and revenue

### 05 Line Managers

Want to see reports that draw together key metrics of business performance with feedback data from customer interactions.



Selecting questions for transfer from Confirmit Horizons to Salesforce



Reviewing data for transfer from Salesforce to Confirmit Horizons

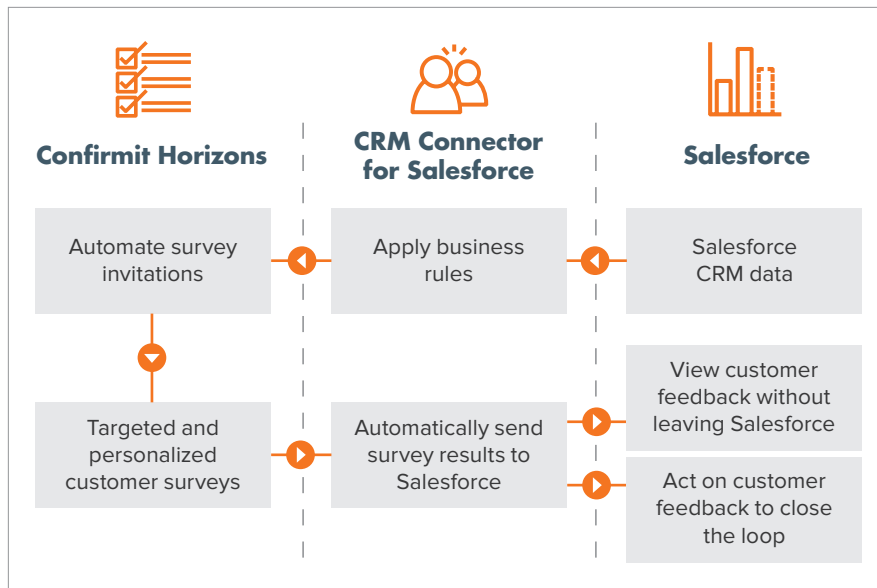


## Simple Setup and Maintenance

CRM Connector for Salesforce provides an easy-to-use setup wizard for mapping the fields in Salesforce to the corresponding data points in Confirmit Horizons.

The wizard also includes easy configuration of filters to be applied when selecting data from Salesforce to be sent across to Confirmit Horizons. The software can be set up to transfer all changed data from Salesforce into Confirmit Horizons on a regular basis, e.g. once every hour or once a day.

The wizard also allows simple setup to send survey data on a regular basis from Confirmit Horizons back to Salesforce. Once the survey data has arrived in Salesforce, it can be presented in Salesforce reports combining it with other CRM data, or used to trigger actions to close the loop on customer feedback. Your organization can see and act on the VoC feedback data without leaving their familiar Salesforce CRM environment. This not only saves time, but ensures your teams stay on top of all their latest customer data.



### AS AN ACCOUNT MANAGER, I WANT TO...

- See important customer information such as satisfaction scores alongside other data in Salesforce, so that I have all relevant information about the customer in one place
- Identify at-risk accounts

## About Confirmit

Confirmit is the world's leading SaaS vendor for multi-channel Voice of the Customer, Voice of the Employee, and Market Research solutions. The company has offices in Oslo (headquarters), Grimstad, London, Moscow, New York, San Francisco, Sydney, Vancouver, and Yaroslavl. Confirmit's software is also distributed through partner resellers in Madrid, Milan, Salvador, and Tokyo. Confirmit powers Global 5000 companies and Market Research agencies worldwide with a wide range of software products for feedback / data collection, panel management, data processing, analysis, and reporting. Customers include Aurora, British Airways, British Standards Institution, Copart, Cross-Tab, Dow Chemical, GfK, GlaxoSmithKline, GMO Research, KeepFactor, Morehead Associates, Nielsen, Research Now, RS Components, QRS, SSI, Sony Mobile Communications, and Swisscom. Visit [www.confirmit.com](http://www.confirmit.com) for more information.