

How Plansource Uses AskNicely NPS with Salesforce to Transform Customer Relationships

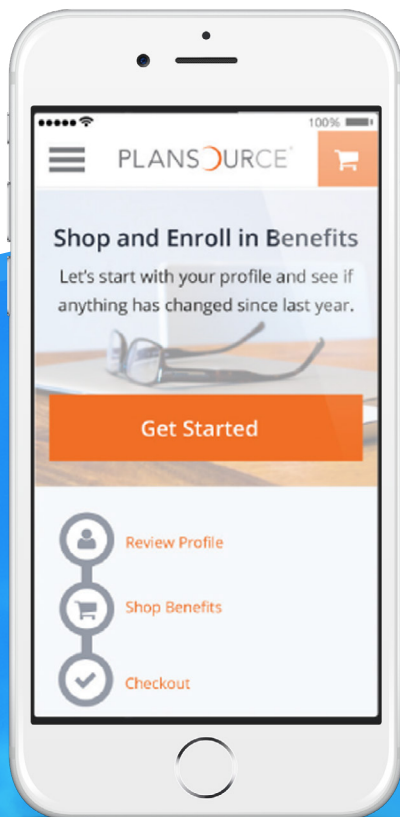




Every executive at PlanSource cares deeply about our customer experience and pays close attention to the AskNicely survey results.

**BRENT BOOTH – DIRECTOR,
STRATEGIC SYSTEMS AT PLANSOURCE**

Plansource — a high-growth Human Resources SaaS company with six locations across the US — is making the art of HR benefits and human capital management (HCM) seamless and straightforward. Plansource simplifies the complex nature of HR management. They've addressed this by developing a cloud-based platform that helps HR benefits administrators and benefits brokers to provide benefits packages to employees.

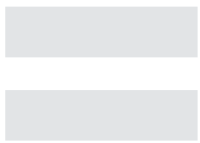


A Better Path to Happy

Historically, Plansource used annual satisfaction surveys and staff insight to gauge customer satisfaction. There was no systematic process to capture real time input from customers that translated to a daily gauge of customer satisfaction across the business. Customer surveys were sent annually to their full customer list. When it came to the annual customer survey, results could vary widely, resulting in annual action plans to improve results. Plansource was eager for a more automated, instantaneous solution to gauge and optimize customer experiences for the better.

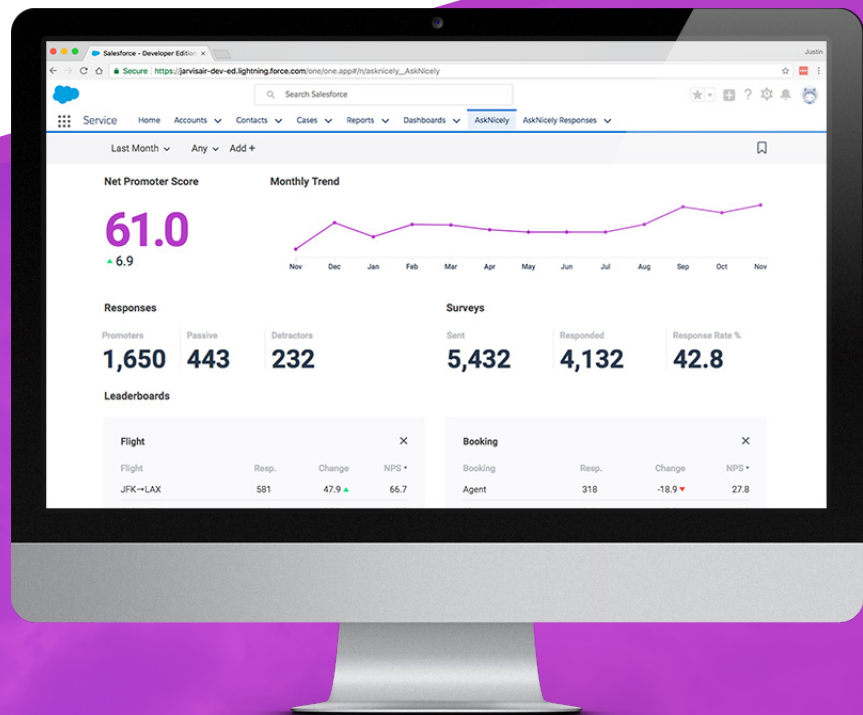


Plansource, AskNicely, and Salesforce



Automated NPS Magic

Before implementing AskNicely, the state of Plansource customer experience looked reasonably smooth on its surface with an annual Net Promoter Score ranging from 55 to 67. However, the Plansource team believed they could better gather and then act on data and other feedback by combining real-time, automated NPS with Salesforce.



“We chose AskNicely for the value and ease-of-use. We also found the Salesforce Integration to be both simple and robust,” Booth said of why they went with AskNicely. Like most growing SaaS companies, Plansource relies on Salesforce to automate many of their critical operational processes like managing customer relationships across account management and client services teams — two departments directly impacted by customer feedback. “It was a swift and easy implementation,” related Booth. “But one of the major decision points was around surveying the right customers at the right time. AskNicely helped with that.”

With AskNicely seamlessly integrated with Salesforce, Plansource was able to automate the entire feedback gathering and response process. Automated NPS equipped account management and client services managers to solve challenging customer problems in real-time while optimizing how business-to-client communications were handled.

**In just nine months,
Plansource raised their
NPS by 35%.**

From product development to customer success to internal communications strategy, AskNicely, when used with Salesforce, creates a nexus of feedback that allows Plansource to retain customers, reduce churn and increase revenue.





Founded in 2014, AskNicely is a fast-growing SaaS company that helps thousands of forward-thinking companies like Reddit, Xero and Jetstar to transform customer experiences and drive business growth by automatically collecting and taking action on customer feedback in real time — powered by the Net Promoter Score framework. Rated #1 by G2Crowd, AskNicely empowers entire organizations with insights and understanding to reduce churn, increase customer retention and automate advocacy. AskNicely has offices in Portland, Oregon and Auckland, New Zealand.

To learn more about how to automate your NPS for true business impact visit at asknicely.com