



Customers Truly at the Center: Intacct Listens with TopBox Analytics

"We've been able to improve Product, Support, Services, Sales and Marketing with the insights from our customers and analytics from TopBox."

- Derek Taylor, VP of Client Services

"My team now has clear action items that we can track and measure for improvement. Waypoint Group helped us build a solid feedback program."

- Kimberly Graham, Customer Success Program Manager

Overview

Intacct, a global cloud ERP software provider, hired Waypoint Group to establish a closed-loop customer engagement program pinpointing gaps and opportunities for customer success. Intacct strives to create Customers for Life, and this program served to build the foundation to achieve that goal.

Previously, the company executed a Net Promoter Score (NPS) program but struggled to extract actionable insights to improve retention and customer success. This new program has allowed the front-line to easily follow-up with customers, quickly engage those who have questions, and discuss new features and functionality they may have missed from Intacct's quarterly releases. The leadership team also has the ability to prioritize improvements across the business and allocate resources in critical areas.

Results

Using TopBox, the Intacct Client Services and Customer Success teams developed a holistic program adding value to both customers as well as across the company. Account teams can now proactively address customer needs, provide solutions, and have improved the quality of their customer data with role-based segmentation for customer contacts, including Decision Makers, Influencers, and End Users.

Improved Response Rates by 900 Percent

Increased engagement yields richer data and helps Intacct demonstrate to its customers they are truly listening.

Identified a Leading Indicator of Engagement and Satisfaction

Disengaged accounts are a big red flag for many reasons. Closing the loop with Non Responders helps account teams demonstrate a commitment to customer success and willingness to provide solutions as a valued partner.

Proactive Solutions

Complex solutions require longer discussions for customers to understand and adapt. Regular discussions with accounts throughout the year help provide the right resources to proactively address customer needs.

Reduced Time to Identify Intacct MVPs

Quickly find advocates who are passionate about Intacct and want to share their expertise and perspective with other Intacct customers and prospects.



How'd They Do It?



Streamlined the Feedback Process

Optimized feedback request strategy and cadence into quarterly waves, ensuring account teams have bandwidth to close the loop with 100% of customers.

Created clear calls to action for Account Managers through alerts generated by TopBox and synced with Salesforce.

Actively focused on closing the loop with Passive respondents to better understand what they need to be more successful and convert to Promoter status. The team also focused on Silent accounts to nurture the relationship and increase engagement.

Promptly addressed negative comments, regardless of Recommend score. By increasing this outreach to acknowledge and discuss customer's comments, the team built trust and recognized customers for their time and effort. By acting on customer's suggestions, Intacct continues to prove their commitment to creating Customers for Life and enabling success.



Account-Based (1-to-1) Analytics

Strengthened individual customer relationships with account-based reporting distinguishing how feedback and sentiment differ between use cases and the people within an account. In addition to traditional 1-to-Many analysis, the Intacct team used the 1-to-1 approach to connect personally with customers and understand their definition of success.

Integrated role-based segments for each account to better determine success goals for Decision Makers, Influencers, End-Users, and others. Within Intacct customers, the buying committee and user community includes people with varying roles and goals. By distinguishing between these roles, Intacct is able to close the loop more effectively, approaching conversations in a meaningful, personalized way.



Shared Insights Across the Company

Engaged all departments across the company to provide solutions and leverage the insights for cross-functional improvements.

Communicated the program's actions and results with all customers surveyed in a quarterly summary. The messages include upcoming plans and any actions taken within Intacct based on feedback received, which further exemplifies active listening and helps increase engagement moving forward.

About Waypoint Group

Waypoint Group has pioneered the B2B customer success industry through tested and strategic methodologies that build loyalty with measurable ROI. Using their own SaaS analytics, TopBox, the Bay-area firm delivers actionable insights that quickly prioritize and quantify churn risk and upsell opportunities by linking feedback to financials. Harness your company's strategic word-of-mouth and build an Army of Advocates in 30 days or less. Visit www.waypointgroup.org or call 408-673-2211.