



New Account Engagement Platform Drives Customer Success with Feedback Metrics for B2B Firms

Research shows silent accounts are 3-14X more likely to churn, though most companies don't know to focus on this metric

SAN FRANCISCO – FOR IMMEDIATE RELEASE – Customer Success experts, Waypoint Group, announce the release of its account-based feedback and engagement engine, TopBox. A SaaS solution uniquely designed for B2B companies, TopBox enables account teams to automatically view feedback linked with financials to prioritize action and measure customer success ROI. Role-based reporting directs teams to effectively close the loop with the appropriate contact at all levels -- decision makers, influencers, and day-to-day users – to reduce churn and increase satisfaction. Companies can also import current feedback data to view gaps and leverage opportunities instantly.

Derek Taylor, VP of Client Services at Intacct, realized an impressive impact on their Net Promoter® program within days of deploying TopBox. “Being able to automate our measurement process with clear action items for our account teams has been phenomenal,” Taylor said. Before, we had an idea which accounts needed attention, but now we know key drivers for success and which specific points of contact to approach. TopBox has certainly alleviated the pain of acting on feedback data.”

Unlike other survey software, TopBox delivers B2B best practices based on industry research, allowing teams to go live quickly with detailed, out-of-the-box reports. Key performance indicators specific to B2B firms are built-in, like identifying silent accounts, which churn faster. Clear CTA's alleviate the pain points of a closed loop program with automated oversight of the follow-up process, helping the executive

team measure program effectiveness and ROI. Account-based reports allow Customer Success Manager's to holistically understand the strength of account relationships and disseminate insights quickly to other departments, i.e., identify optimal referral sources for marketing and cross-sell/up-sell opportunities for sales.

Noteworthy differentiators:

- Benchmark reporting: visualize how one account compares to similar accounts, and identify the optimal improvement strategies and tactics. Understand differences in use cases and identify why one account is outperforming others.
- Heat Map – links revenue (such as monthly recurring revenue, “MRR”), engagement, footprint, and sentiment in one interactive chart for different account groups such as customer tier, product mix, region, or CSM.
- X-Ray - an org-chart style depiction of each account contact, grouped by role and color-coded for sentiment with email links for immediate interaction.
- Trend analysis – by individual contact or segment, to understand changes in success over time.
- New in the Summer 2015 release: Out-of-the-box integration with Salesforce.com, employee leaderboards, and comprehensive management of customer verbatim (free-text) comments.

[Watch this video](#) to view how companies can understand whether strategic accounts are more successful than others, and how to act on that information.

About Waypoint Group

Based on Waypoint Group's hands-on consultative work over 20+ years, TopBox was created to provide an easy way to understand customer expectations, gaps, and opportunities, while also facilitating appropriate action across the organization. TopBox utilizes B2B best practices in customer engagement, integrates with Salesforce and uses mobile ready questionnaires to deliver

actionable insights in 30 days or less. Convert customer feedback into ROI with incremental cross-sell and up-sell revenue, accelerated sales-ready leads, and improved win rates. Turbo charge a Net Promoter® or Customer Success program with TopBox today at info@topboxtech.com or visit www.topboxtech.com. Connect with Waypoint Group's TopBox on [LinkedIn](#) and [Twitter](#).

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