

Scaling Outreach & Sales Efficiency

The Company

Helpshift provides in-app customer support for mobile app developers, improving the user experience and keeping users engaged in the app to increase retention and boost ratings.

The Scenario

Helpshift was created to address the gap in customer support in the mobile industry. Where traditional support solutions like helpdesks and hotlines have become obsolete, Helpshift stepped in by providing an in-app platform where customers can instantly chat with a representative. Helpshift improves the customer experience within the app, meaning more long-term users and more favorable reviews.

With such a high need in a rapidly growing industry, Helpshift's business grew just as quickly. The sales team soon had so many potential customers, they needed a better way to track and follow up on leads. Account executives, account managers, and business development reps needed a way to save time on customer follow up while also making sure they were providing their customers with the information that best suited their situation.

The Challenge

Scaling Outreach While Improving Efficiency

To address the growing needs across the board at Helpshift, Adam Mintz, Head of Onboarding, decided a document sharing software might be the answer to their growing pains.

Specifically, Adam was looking for a way to increase overall company efficiency in order to save time, lock down sales, and scale their customer outreach.

Here are the areas that needed some help:

1. Account Executives and Business Development Reps needed a way to track decks and gauge interest for follow up calls.
2. Account Managers needed to understand customers' use of implementation guides.
3. Customer Success teams needed more visibility into the usefulness of best practice guides – so they could improve the content and get more customers to be self sufficient.



"We needed a way to track decks and implementation guides we send to current customers and trial customers. We wanted to make sure they were viewing these files, so if we had a follow up call with them, we knew specifically what they had reviewed carefully and what they had skipped over."

– Adam Mintz

The Solution

DocSend for Customer Interactions

Having used DocSend personally for some time, Adam knew DocSend was exactly the tool the rest of the Helpshift team needed.

DocSend provides analytics and control for the decks and documents you send. The process is simple: upload your deck, create a unique link, and share the link over email. You'll receive open alerts and have access to deep engagement data in the DocSend dashboard.

All Adam had to do was invite his colleagues to join his DocSend team. From there, the rest of Helpshift was up and running in under two minutes. Using the DocSend Chrome extension put DocSend right inside their Gmail and allowed them to generate and send out trackable links without leaving their inbox. The team immediately began tracking sales decks and onboarding guides without spending any extra time.

"It should be easy to generate a unique trackable link, especially when you're firing so many emails and juggling so many tasks. And with DocSend it is easy. We use it in Sales, in Account Management, and in Business Development."

– Adam Mintz

The Results

Analytics Improved Collateral and Follow-ups

DocSend quickly solved the challenges faced by the different Helpshift teams, from sales to account management to customer success.

Using DocSend's analytics, especially in daily and weekly digest form, here are some of the ways Helpshift is able to save time and scale their customer outreach:

- The outbound team uses DocSend to track where potential customers are focusing on their sales materials. They know exactly how to follow-up to hit their customer's key points of interest.
- Account Managers can tell if clients are spending more time on certain parts of implementation guides and ignoring others. This data allows them to adjust their materials to make key items more visible and to hone in on the right message.
- Account Executives make sure customers are getting the most out of the material they send out, ensuring quality targeted follow-up and efficient use of time in one-on-one meetings.

Overall, DocSend's analytics allow Helpshift to streamline their sales, create targeted documents for different industries, and perform customer follow-up in an efficient and scalable way.

The Helpshift logo, featuring the word "helpshift" in a white, lowercase, sans-serif font on a dark blue square background.

"If I had to choose three words to describe DocSend, I would choose: simplicity, usability, and efficiency. It's all about saving time, so we can reach out to our customers in a scalable way."

– Adam Mintz

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