Replacing SalesForce for Customer Success Management

Connect First Alleviates Cumbersome Activity Management by Replacing SalesForce with Bolstra

Connect First

Connect First is a communications platform that provides contact center applications for inbound and outbound purposes. With a highly customized offering, their customer engagement processes involve clear expectation-setting during pre and post-sales, and include varied and multiple touchpoints. Logging, managing and understanding all of these activities as they relate to potential closed deals and customer satisfaction was cumbersome, if not impossible, with SalesForce. Replacing SalesForce with Bolstra to manage the work of their entire Customer Success team (beginning with pre-sales solution-engineering) has saved the company money in SF licenses that weren't being used to help them do their job, **and** allowed them to fully manage their activities and workflow. Using Bolstra to manage all of the Customer Success activities has provided Connect First with greater visibility into their work and the data their management team needs to gain insights for improving processes and properly staffing, assigning and training the right people.

Connect First replaced **100%** of their CS team's SF licenses with Bolstra, which resulted in **0%** of data lost, and a much needed increase of visibility into CS activities previously unavailable in SalesForce.

The Problem

Logging and Tracking Touchpoints Doesn't Work with SalesForce

Connect First creates and hosts software for their call center customers. Beginning during the pre-sales relationship, solution engineers are brought into the relationship to help understand the prospect's desired use of their solution and set realistic expectations so that there's no miscommunications or fumbles when they become customers. This pre-sales role is part of Connect First's customer success structure, along with implementation specialists and more traditional CSMs. All three roles involve many and varied customer interactions (touchpoints).

> *"Logging Customer Success activities and being able to glean any insights about them was extremely cumbersome for my CS team to use and way too difficult for me to analyze with SalesForce"*
>
> — ROB SCHNEIDER, Connect First EVP OF CUSTOMER SUCCESS

Schneider explains

> *"Our leadership made the decision to find a customer success platform which would support the team's proactive workflow management, easily allow them to log touchpoints, and provide management with the data we need to properly plan and lead our team. Implementing Bolstra has done this for us!"*

The Solution

A Three-Dimensional CS Department Flourishes with Bolstra

Customer Success at Connect First consists of three roles: Solution Engineering (pre-sales), Implementation (launch), and traditional Customer Success Managers (ongoing relationship). This model is designed to control the risk of fumbles from pre-sale through to post-sale. With some overlap built into their responsibilities, the resources know what has been done before them, and where they pick up the relationship. Everyone on the team has the same access to the dashboard and kanban boards that provide a full picture of each lifecycle and all activities associated with an account. This visibility supports a smooth transition from teammate to teammate. More importantly, the customer never feels that they are being handed over blindly. This kind of internal transfer of knowledge and responsibility is made easier when all members have full transparency into the history of the relationship, including every touchpoint. It just couldn't be done with SalesForce, and is being done now in Bolstra.

- The solution engineer receives a triggered alert when the sales team has identified that a prospect has a certain percentage of likelihood to close, based upon their metrics. This kicks off an engagement with triggered activities for them to set up a demo, craft a SOW, conduct a deeper discovery, or set expectations, depending upon where they are in the sales cycle.

- This person then logs all their time and touchpoints as they move the deal to Closed.

- A closed deal automatically triggers another engagement for the Implementation specialist to begin their work.

- Similarly, once the customer is launched, another engagement kicks off for the CSM which includes the first year customer lifecycle activities, contract renewal activities, and expansion opportunity indicators.

The Value

Accurate View of the Work CS Does Yields a More Efficient Team

With a prescribed workflow and the ability to log and manage touchpoints, Connect First has a more comprehensive and accurate view of the work the Customer Success team does. Having this information has allowed management to manage capacity better: define roles, allocate resources and refine (best practice) processes. This same visibility has helped individual CS team members see their own work, identify patterns, and become more strategic in their own work management. The bottom line is that with a clearer picture of the work involved, Connect First now focuses their Customer Success team on their customers' success, rather than figuring out how to document their work.

None of this could have been done in SalesForce.

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Getting out of SalesForce was important to us. We simply were not able to properly log touchpoints and derive any meaning from the activities we could log. It was difficult to create any proactive plan for our team. We now use Bolstra to connect the pieces from pre-sales to post-sales, eliminate dropped balls, track renewal dates, and log all touchpoints.

— SCHNEIDER

Connect First + bolstra

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