

Swept Uses Salesforce Chatter for SaaS Customer Success

How One SaaS Company is Improving the Customer Experience

The Company

Swept makes user-friendly software designed specifically for the Janitorial Industry. They help companies grow their business by enabling communication about issues on site, cleaning instructions, supply requests, and inspection results.



The Challenge

Six months ago, Lyly joined Swept as their first Customer Success team member. When she arrived, user information was siloed in the Sales team's heads or scattered across Google sheets and numerous inboxes. In short, there was no centralized place for Lyly to view customer information and history.

Lyly began to shop around for a product that would help centralize customer data, increase collaboration between Sales and Customer Success, and provide her with a snapshot of the health of each client. During her search, she struggled to find a product that seamlessly integrated customer information with corresponding tasks.

Then she discovered Salesforce Chatter.

The Solution

CENTRALIZING CUSTOMER DATA

"At the beginning of the day I log into Salesforce, take a look at my tasks and quickly check in on all my customers. In one place I can see each user's account information, every email, case submitted, as well as how often they're logging in and using the product," says Lyly.

Being able to see the engagement level of each user, as well as every interaction they've ever had with Swept allows Lyly to provide seamless service. "When I speak with customers, I can quickly pull up their file and know exactly how to help them based on their account information," says Lyly.

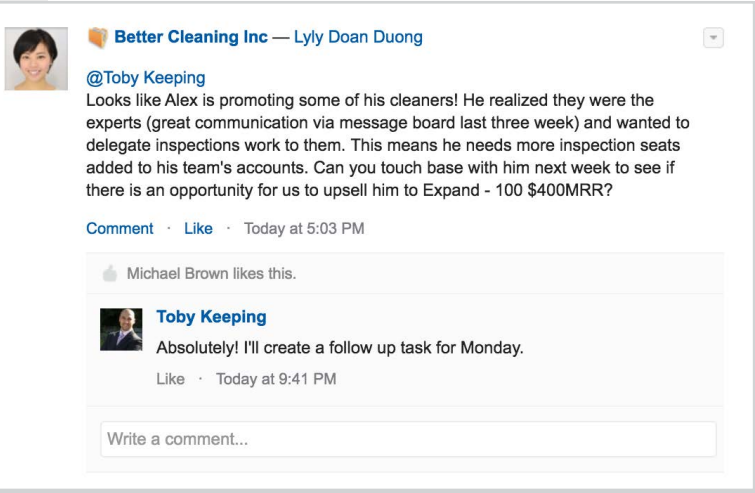
Additionally, Chatter makes information searchable across documents, tasks, people, groups, and teams. This significantly decreases the time Swept's team spends looking for specific account details and ensures colleagues across departments and geographies are all accessing the same information.

INCREASING COLLABORATION

Now that Swept is able to identify which users are having the most success with the product, upselling has become much easier. Chatter eliminates all the unnecessary back and forth between Sales and Customer Success.

“When there’s an opportunity to upsell, I simply notify the Sales team via Chatter and they can take it from there without having to reach out further to review the account.”

- Lyly Doan Duong, Customer Success Manager, Swept



Better Cleaning Inc — Lyly Doan Duong

@Toby Keeping
Looks like Alex is promoting some of his cleaners! He realized they were the experts (great communication via message board last three week) and wanted to delegate inspections work to them. This means he needs more inspection seats added to his team's accounts. Can you touch base with him next week to see if there is an opportunity for us to upsell him to Expand - 100 \$400MRR?

Comment · Like · Today at 5:03 PM

Michael Brown likes this.

Toby Keeping
Absolutely! I'll create a follow up task for Monday.

Like · Today at 9:41 PM

Write a comment...

On the flip side, Chatter has also been an avenue for Customer Success to recognize customers who are struggling and work with Sales and Support to make sure their issues are resolved.

“I can see if a user isn’t logging in or is having difficulties with the product. This prompts me to follow up with that user and if I don’t see the user’s engagement increase, I can escalate the case to Sales using a Chatter post. Chatter simplifies this process by consolidating account information and the conversations Customer

Success has with Sales in one place. This system has helped reduce churn and ensure renewals occur by being proactive in engaging users that are at risk for abandonment,” says Lyly.

CELEBRATING SUCCESS

Like many startups, Swept’s team consists of employees who work remotely and a busy CEO who’s on the road a lot. Celebrating successes as a team was difficult before Swept adopted Chatter. However, because Chatter licenses are free, all of Swept’s employees (not just Sales) are connected. Now, celebrating as a team is easy. Lyly simply shares positive customer feedback using #HappyCustomers or #HappyCleaners via Chatter.

“In the past, relaying positive feedback from our users to our product team was especially difficult. Now our developers can see how their hard work translates into people using and seeing value in the product they’ve built,” says Lyly.

The Result

CUSTOMER-CENTRIC ROADMAP

Beyond all the ways Chatter helps facilitate effective Customer Success, it also helps Swept develop their product for the future.

“Gathering feedback helps us shape our roadmap and make sure we are developing a product that serves our customers. Discussing their challenges and hearing what our users have to say is how we decide internally our priority projects and a timeline for those projects. Like all startups, we have limited resources so being able to gut check our priorities with what our users biggest pain points are helps us focus our efforts on what matters most,” said Lyly.