

Booksy improves their customer and employee experience with a customer 360 in Salesforce



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Bad data quality is the party-crasher of a customer 360. When employees and automations don't have the right customer insights, personalizing the customer journey gets challenging. When **Booksy** started looking for a solution to enable a single source of customer truth in their Salesforce, they found Plauti. The solution deduplicates and consolidates fragmented customer data and empowers sales and customer success with a unified experience within their Salesforce instance, enabling them to exceed the expectations of those very same customers.

Omnichannel challenges

From first learning about Booksy to getting on board and using their SaaS app – Booksy wants customers to have a cohesive and smooth journey with them. That's why they invested heavily in an omnichannel approach. "We are strong believers that the old way of working, being able to only use the phone, email or even chat, is obsolete", says Jakub Klimaszewski, Global Salesforce Manager at Booksy.

To facilitate this omnichannel approach, Booksy implemented Salesforce Sales Cloud and Service Cloud. For now, only their B2B information lives in these instances and is used by several stakeholders. "Sales Cloud is the main source of merchant information and is used by over 500 users from sales, customer service, and customer success. Here they start their activities and expect to work with a single source of customer truth", Jakub explains.

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There are multiple ways through which people can get to know Booksy, Jakub explains; “people come in via our app, from paid media like advertising on Instagram and the Apple Store. Or they reach us via landing pages and blogs. Furthermore, we have a field team, so people go from door to door. Lastly, we occasionally enrich our database with data from external data providers.”.

Once leads have converted to paying merchants, they can contact Booksy via email, phone, WhatsApp, and a chat within their app.

Although this omnichannel approach brings initial convenience for leads and merchants, those various sources of leads and multiple ways of interacting with Booksy also translated into the loss of a single customer view. “A merchant who talks to one of our field service reps about Booksy, but who is not interested at that moment, lands in our Salesforce instance. After a week or two, this merchant remembers there's something like Booksy and decides to start a trial, which creates a separate record in Salesforce, with the same name and contact details. Furthermore, if the same person downloads a white paper from our blog, this would create another record”, Jakub explains. As Booksy doesn't work with the lead object in Salesforce, this would create three accounts in Salesforce with the same data with consequences for the customer journey. “In the worst-case scenario, we would have three separate sales reps working each of those accounts”, Jakub says.

Besides causing a suboptimal experience for merchants, this also wasted sales resources. “Around 30% of leads purchased from external sources are already in our Salesforce”, Jakub explains. “We've already spoken to these merchants, some of them converted, some not. Dedicating extra resources to contacting them again sometimes caused frustration for both our sales reps and for the merchant.”

After signing up, merchants are onboarded by customer success on how to be successful with Booksy. This added another possible hick-up in the merchant experience. “At this point, customer success could have been the fourth or fifth person contacting them”, Jakub explains.

Prevention on all entry points

Their search for a solution that could unify and create a trusted view of the merchants in their Salesforce Sales Cloud led Booksy to Plauti. According to Jakub, the standard deduplication tool for Salesforce lacked the needed functionality. “It's mainly manual and you don't have this much flexibility in the matching and merging rules”.

One of the first reasons to choose a Plauti data management solution was the option to deduplicate and consolidate live and natively. “You're probably the only solution on the market that gives us the ability to deduplicate live. I don't want to wait 24 hours for it to happen, I want it to be done instantaneously”, Jakub says.

To identify duplicates, Booksy makes extensive use of the scenario functionality. Plauti helped Booksy with the setup by translating business needs to scenarios. As Jakub explains; “what I loved was that Plauti helped me determine what would be the impact of a scenario.

Thanks to that I was able to find the golden rule for all our scenarios, to not show any false positives. This changed the way I could work with matching rules and we now use them for all entry points; for API, for manual account creation and flows.”

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The scenario functionality also made it easy for Booksy to adapt the deduplication and consolidation to changing business priorities. “Over the last few months, we realized we wanted to put more emphasis on phone numbers and the name of the business than on other aspects of the account and we were able to do it without any problem.”

When asked what Booksy likes the most, Jakub replied that the merge rules are convenient. “The real game-changer is the merge rules. I love them. The merge rules fit our business logic, adding the convenience of not having to code anything. What is also great, is that we can set up different access levels to different kinds of profiles. Like being able to give sales reps only access to set for merge instead of merging.”

Once Booksy got confident with their matching and merge settings, time-saving through automating was added. “Right now, 40% gets processed manually and 60% gets either direct processed or auto merged after a job. But we are still cautious because it influences other processes and we have to get this done properly.”, Jakub explains.

Improved merchant & employee experience

Plauti enabled Booksy to achieve its number one priority: to deliver a personalized and smooth customer experience for every merchant along every touchpoint of the customer journey. “Overall we see a lot of return on investment. Having clean data helps to excel at the customer experience during the whole customer journey. Right now, there is only one sales rep who's calling and you get one dedicated customer success manager. As a merchant, you know who this is going to be and when to expect the call, which makes it easier.”

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Conclusion

Furthermore, Booksy was able to improve sales productivity. “When we uploaded a database from a partner it turned out 60% of those were duplicates. It saved us 60% of the potential time of sales reps and SDR reps of calling this database. Any possible frustration on the side of the merchant because of multiple or irrelevant outreach is now gone too.”

Besides being able to streamline pipelines, the time needed to assign commissions to the correct sales rep was cut back from a few hours every month to nearly zero. “Commissions are based on the ownership of different accounts, opportunities and so on. Right now, it's straightforward, every single account is deduplicated so there are no cases where sales reps A would claim they had anything to do with the account of sales rep B. It improved the life of operations, sales team leaders and the working relations within the team”.



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