

FiveStars Loyalty Simplifies Onboarding with Sertifi & Zuora

**FIVESTARS**

FiveStars Loyalty is the fastest growing company in customer loyalty and marketing automation for local businesses. Launched out of Y-Combinator to democratize Fortune 500-level loyalty technology, the company now drives two million customer visits per month across a network of over five thousand businesses and has raised a total of \$45 million in funding from top-tier investors like Menlo Ventures, Lightspeed Venture Partners, and DCM.

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The Sertifi and Zuora integration was a true game changer for us – it allowed our clients to sign and pay online in the easiest way possible, something DocuSign just couldn't offer us.

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the CHALLENGE

Since 2013, FiveStars had been using Zuora to meet their billing subscription needs. Disjointedly, the sales team had been utilizing DocuSign to capture client signatures electronically. For every deal, more than 100 sales reps were forced to call their clients (mostly small business owners) in order to facilitate with the signing and paying process.

Over the phone, sales reps would talk clients through the signing process. Clients struggled with required fields within the contract and often complained about the unintuitive signing interface. While on the call, sales reps would gather client credit card information and manually input the data into Zuora. These post-deal calls generally took more than 10 minutes. FiveStars required an easier way to conduct business with their clients and a more secure process for collecting sensitive cardholder data.

the SOLUTION

Sertifi caught the attention of FiveStars' sales operation manager at Salesforce's annual customer conference, Dreamforce. The sales operation manager found the first of its kind Sertifi and Zuora integration to be a perfect fit for the company as it would automate core business processes and maximize sales velocity.

FiveStars switched from DocuSign to Sertifi in order to utilize the Sertifi and Zuora integration in 2015. The straightforward process involves clients receiving a FiveStars branded email directing them to the contract awaiting review and signature. The Zuora hosted payments page is embedded within this contract, allowing clients to sign and pay simultaneously within minutes! The simple interface is easier for clients, making the process much quicker to complete.

the RESULTS

Sertifi helped FiveStars eliminate timely post-deal steps, offer an easy client onboarding experience and reduce PCI risk by sales reps never accessing client credit card data. Within minutes, clients sign and pay using Sertifi. No post-deal calls required, saving sales reps 20% of post-sale time on each deal.

With Sertifi, FiveStars was able to eliminate unnecessary steps including calling clients to guide them through signing, gathering credit card data via phone and manually inputting the data into Zuora. Not to mention, sales reps are no longer responsible for informing clients of credit card transaction declines. If a card declines, the client is required to correct any errors before moving forward.