
Insuring Insight

The SquareTrade Success Story

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OVERVIEW

SquareTrade had existing legacy system that generated survey records to determine individual partner performance and determine sales agent effectiveness in a specific region of their business. This legacy system did not provide per account visibility that would enable them to have visibility at an account level through layouts or reporting. While the existing solution collected and showed survey data, there was no relation to accounts to make this data actionable in daily sales team activities.

The Problem

This legacy system did not provide “per account” visibility that would enable them to have granular statistics and fire emails and notifications based on when at an account level through layouts or reporting. It also did not provide any mobile entry or any form of edit options, essentially once entered, the data was “dead” and only viewable in a limited way.

The Goals

- Provide granular, actionable data to sales teams at relevant times in their process
- Build a reporting structure that allowed management to dive into specific channels for trend analysis
- Create a streamlined, mobile experience for end users that both kept data clean and orderly as well as provided an easy way to edit when appropriate

The Solution

PixelTag constructed an integrated survey structure with real time account correlation. This new visibility allowed marketers and sales agents windows into specific channel performance as well as best strategies that were employed at successful stores. This solution also included a fully mobile solution for easy survey entry. Full transparency across the team via shared dashboards allowed for more collaboration and talking about why some tactics work better than others for sales.



We constructed the database structure to enable complex non-standard reporting on sales activities. These report types enabled the company to flex the social enterprise of salesforce and have honest discussions on what tactics are working best and what are falling by the wayside.

The Results

This new structure enabled SquareSpace to have “at a glance” health checks on accounts, directly on the account page, driven by live survey data. Enabling further automation when accounts hit a bad streak or began to dip below performance metrics. Allowing the company to ask “why” sooner, before sales took a hit. Adjusting what methods worked best for their customer base in this dynamic environment.