

A 360 Customer View: How NexHealth took their customer success to the next level with Salesforce Service Cloud

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NexHealth is a San Francisco-based patient experience management platform with the mission to empower doctors to run thriving businesses. The NexHealth app allows patients to book appointments directly with their healthcare provider 24/7, providing medical and dental practices with new means to attract and retain patients while ensuring an excellent level of customer service.

The company had been growing at a rapid pace and closed their Series A funding in June 2020. As more and more customers signed up, it became increasingly difficult for the Customer Success team to onboard new accounts efficiently. The team also struggled to manage their email, phone and chat enquiries due to system fragmentation, causing customer satisfaction to suffer. On top of this, the team had no repository for their data and therefore no reporting or dashboards that could help them identify where to focus their efforts.

“There was no source of truth around customer inquiries. Customer satisfaction was being impacted; the team was being slowed down and could not manage or prioritize work effectively.” — Hallie Pond, Operations Lead

The NexHealth executive team decided it was time to unify the company’s Customer Success and Support processes into one platform – Salesforce Service Cloud. The team evaluated several Salesforce partners, but had concerns around whether they would be able to align with NexHealth’s fast-paced working environment. After an internal recommendation, NexHealth was introduced to Candybox and determined that the consulting group’s approach and background working with similar companies was the right fit for them. An implementation plan was then created with an ambitious timeline of six weeks to launch.

During the initial phase of the project, the Candybox team interviewed various team members at NexHealth to understand how they managed their day-to-day work, and put

together recommendations to consolidate and improve these workflows. Following this, Candybox and NexHealth met to align on the deliverables, and the green light was given to begin development. A month later, the NexHealth support team was able to move to a fully-integrated Service Cloud solution – a far cry from the old process of handling phone calls through Aircall, chat through HubSpot and email through a shared Gmail inbox.

The impact was immediate. According to Hallie Pond, the effect was **“life-changing”**. Now, several months after go-live, not only has response time decreased, but visibility across accounts has increased, and customer satisfaction has gone up.

Following the initial Service Cloud launch, two other initiatives were identified. The first was creating a knowledge base using Salesforce Communities and Salesforce Knowledge. At that time, around 50% of inbound customer enquiries were simple questions that could have been answered if better self-service information were available. The knowledge base allowed the Customer Support team to make a huge repository of information available on-demand to NexHealth customers and gave customers the chance to solve simple issues immediately without waiting on a response from the NexHealth team.

The second initiative was designing an improved onboarding workflow within Salesforce. The team knew that customers were getting stuck at certain steps of the process, but were not able to gather meaningful data on when, how often and why this was occurring.

They were also having difficulty measuring how many customers were reaching their goal of booking two appointments via the NexHealth app within two weeks of onboarding. The new onboarding process addressed both issues, providing time tracking and dashboards to understand where customers were having difficulties, and a Pendo integration to view bookings data and timelines within Salesforce.

Since launch, the time to onboard an account has decreased from 45 days to around two weeks. Supported by new, scalable processes the Customer Success team is poised to take advantage of increased growth in 2021 and the NexHealth and Candybox teams look forward to a continued partnership.

“It has been wonderful to have a thought partner when it comes to systems and operations and not be in a silo. Working alongside the Candybox team has been amazing.” — Hallie Pond