



**Now available to SugarCRM users, Clicktools can drastically reduce the time, effort and cost of building surveys, scripts, forms and landing pages to create and /or update ANY SugarCRM information.**

- Create/update standard fields and objects (such as Account, Contact, Opportunity etc.)
- Create/update custom fields and objects
- Create/update unlimited information from one survey/script
- Conditional/Rule-based synchronization. E.g. only do X if the answer to question 1 is Y
- Automatic synchronization based on close/submit
- Manual synchronization for 'failed' synchronization and bulk transfer
- Full error reporting and tracking
- Use any information to check whether information exists and then update rather than create

**On Demand software to build, deploy, analyze and integrate surveys, scripts, forms and landing pages.**



***Powerful engine for building web based surveys, scripts, forms and landing pages...***

Survey tools are ten-a-penny but some features separate the 'men from the boys'. If you're serious about collecting information and feedback (let's face it - can you afford not to be?) the following functionality may come in useful: Multi-user system to track and control surveys across multiple departments. Full WYSIWYG editor to build content using over 17 question types or pre-defined content from question libraries. Change and personalize content based on information stored against contacts or completed answers. Make questions hidden and/or required. Build and deploy the same survey in ANY number of languages, include custom html/javascript and build master/subset surveys to track questions across multiple surveys.



***Completely reflect your brand to your customers...***

We believe that every survey or form you build and present to customers should reflect your brand so, whilst we don't provide templates called 'Summer Flowers' or 'Spring Meadows', we do provide the ability for you to have complete control over the look and feel of your content with our WYSIWYG interface.



***Seamless multi-channel deployment...***

It's unlikely that you will collect information and receive feedback from one source. Email and web is the most common but what about inbound/outbound calling, paper based surveys and IVR? Clicktools enables you to deploy the same survey in multiple modes.



***Powerful 'out-of-the-box' analysis with filtering, correlation, trending and much more...***

Whilst many tools focus on collection, Clicktools focus is the use of that data to improve your customers' experience. Most tools provide export options but, Clicktools provides much more to drastically reduce the time and effort involved in building summary reports and, more importantly, understanding the data. The results for every question in every survey are automatically available enabling you to quickly drill down to exactly the information you want. You can see the individual responses and results can be exported/published as raw data or results tables. And, if that doesn't give you enough power and flexibility there is always Clicktools Analytics.



***Secure and scalable environment...***

If you are putting Clicktools in front of your customers, its only right that you want to be safe in the knowledge that your information will always be collected and any data is stored safely and securely. Clicktools hosting partner is Rackspace Managed Hosting who provide state-of-the-art hosting. Advanced architecture including Firewalls, Load Balancers and Intrusion Detection software provide up-time guarantees, whilst functionality including the ability to deploy secure surveys over https://; and restrict application access to defined IP addresses and Email relaying means that your feedback is in safe hands.

## **Clicktools for SugarCRM is used across the whole of the Sugar product set with popular applications including:**



### **Support/Case surveys...**

Capture simple or complex feedback immediately after a case is closed and capture the information in the best place - directly against the case itself or in a custom object. Complete surveys by phone or email - the choice is yours.



### **Net Promoter® ...**

Net Promoter asks customers how willing they are to recommend you to a friend or colleague. Based on responses, you can calculate your "Net Promoter Score". Clicktools enables you to seamlessly integrate the NPS approach with SugarCRM.

*(Net Promoter is a registered trademark of Fred Reichheld, Bain & Company and Satmetrix Systems, Inc.)*



### **Outbound/inbound Call-scripting...**

If you need the ability to launch personalized scripts from custom links/tabs/buttons including functionality such as conditional scripts, synchronization to multiple objects and full analysis of your results then Clicktools may just be that pick me up you need.



### **Customer satisfaction/new customer/post-implementation surveys...**

You wouldn't look at your organization financial results once every 12 months, so it's a mystery to us why so many organizations only ask their customers for feedback once a year. Integrating CRM with feedback enables you to advance from a time based feedback approach (e.g. yearly surveys) to an event-based program. Capturing feedback at key points in your life cycle helps you to understand weak and strong points in your customer experience and prioritize improvements that will most positively impact advocacy, loyalty and profitability.



### **Complex Web2Lead...**

Whether you use Leads or Contacts and Accounts you can build and deploy any web2 form within minutes. Add responses to campaigns, allocate to Lead Queues, generate tasks for HOT! Responses. No programming, no html, no IT cost .



### **Win/Loss surveys...**

Find out why you lost (or perhaps even more importantly why you won!) an Opportunity, enabling you to understand, measure and improve Sales effectiveness at an individual, team and organization level.



### **Campaign Tracking ...**

Automatically capture and update campaign records in SugarCRM including Advanced Setup options. This works for leads, contacts who can be added to the campaign or their status amended as required.



### **Subscription Centers/opt-outs ...**

Easily manage lead, contact or custom opt-outs and subscription centers to ensure no-one ever gets a communication they don't want.

**To find out more or request your FREE 30 day trial visit: [www.clicktools.com](http://www.clicktools.com) or call today!  
Freephone: USA 1-800-774-4065, UK 0800 0432587 or email: [sugarcrm@clicktools.com](mailto:sugarcrm@clicktools.com)**