



Satmetrix[®]

PULSE SECURE
CUSTOMER SUCCESS STORY



Using the Voice of the Customer to
Drown Out the Competition

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Pulse Secure is a "new" company born from the sale of Juniper Networks Junos Pulse product line to Siris Capital, a leading private equity firm. Pulse Secure has 10+ years of experience understanding customer needs and goals. As a standalone company, Pulse Secure now brings additional resources and focus to solve the challenges of enterprise mobility faster than ever before.



CUSTOMER EXPERIENCE AT THE CORE OF DIFFERENTIATION

As a results-driven company, Pulse Secure relies on its customer experience management (CEM) program to capture customer feedback and turn it into insights and actions that address gaps in the overall customer experience. With the actionable insights CEM provides, Pulse Secure is able to deliver best-in-class products and services to its customers and partners.

While the founders of Pulse Secure had a long-standing relationship with Satmetrix, they made a conscious decision to rebuild their CEM program from the ground up when forming the new company.

With the selection of Satmetrix, Pulse Secure was able to quickly design its CEM program and integrate it into its business flow. Pulse Secure's CEM program provides the entire organization with the user-friendly UI, intuitive tools and visibility required to drive customer engagement and continual improvement.

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In just over a year, Pulse Secure has been able to increase its Net Promoter Score to 40 (EOY 2016). Additionally, Pulse Secure now has the structure in place to quickly convert customer feedback into process optimizations and product enhancements. That allows Pulse Secure to improve the user experience, deployment and maintenance, which drive customer satisfaction.

CHALLENGES

COMPLEX CUSTOMER JOURNEYS, POOR CX VISIBILITY

When Pulse Secure launched as a new company, it had an enormous customer base but very little visibility into the state of the customer experience.

As a new company, one of the first tasks the leadership team performed was to survey the market and competition to determine the benchmarks for customer experience and what they would need to do to differentiate itself. The Pulse Secure Customer Success leadership team found a strong demand for faster response times and simplified their self-service tools so customers could quickly solve problems.

“The feedback we get from Satmetrix helps drive our customer requirements increasing customer satisfaction and service value proposition.”

– Piyush Patel, Director, WW, Customer Success

“Customer feedback is extremely important to us and it’s a privilege that we do not take for granted,” said Payum Moussavi, VP WW Customer Success. “Satmetrix allows us to get the voice of the customer to the various business units within the company — whether that’s through social media, a support case, or through the website. From that perspective, we can track the voice and derive actionable insights to address the customer experience gap that we may have.”

The management team, led by Moussavi, understood that it would need feedback from its customer base to better differentiate its services and to deliver customer success. To meet their requirements, a CEM system that could capture customer feedback and channel it back into the organization in a way that everyone at the company could easily understand and consume was necessary.

As a technology company that sells both products and services, Pulse Secure has multiple customer journeys with varying key interaction and inflection points, as well as a robust channel partner program that accounts for nearly half its sales.

Like many technology companies, Pulse Secure also relies on its install base for renewals and upgrades. If it was to continue to have success, Pulse Secure was going to have to find a way to keep its customers happy at every stop of the journey, regardless of touchpoint, channel, product or service offering.



CHALLENGES

COMPLEX PROBLEMS IN SEARCH OF A SIMPLE SOLUTION

Whatever CEM solution Pulse Secure selected, its requirements were the following:

- Seamless integration with its Salesforce case management system and other customer support systems
- A simple UI and controls that require minimal training and technical knowledge
- Visual role-based reporting that could be easily shared throughout the organization
- Expert and responsive support and guidance
- Configurable surveys and self-service templates
- Business and industry recognition and approval of their methods and metrics
- Internal employee satisfaction or eNPS tracking

THE SOLUTION

TAKING ACTION TO DRIVE IMPROVEMENTS

As a company that provides global businesses with mission critical technological products and services, Pulse Secure fields upwards of 40,000 support calls each year. In addition to being a core part of its business, these calls present an opportunity to capture the customer experience factors and context driving it at key points of the customer journey.

Because of their importance, these support calls became the immediate focus of the Pulse Secure customer experience (CX) program. The first order of business for the Satmetrix partnership was incorporating the CX process into the existing support workflow. That meant a close integration

with the Salesforce.com CRM that Pulse Secure provides its customers to engage with Pulse Secure Global Support.

Using Satmetrix's native connector for Salesforce.com, Pulse Secure was able to swiftly add the CX workflow to the support cases opened in Salesforce. Now, at the conclusion of a support interaction, eligible customers are sent transactional surveys to measure NPS, customer satisfaction (CSAT), and capture verbatim comments for additional text analysis. The NPX Cool-Off feature is also utilized, limiting the number of surveys individuals could receive within a given period to reduce survey fatigue.

“Satmetrix met our need to simplify not only the collection and processing of feedback but also the reporting of it to our entire organization.”

– Anselm Kia Peng, Sr. Director, WW Customer Success

THE SOLUTION CONTINUED

“Satmetrix met our need to simplify not only the collection and processing of feedback but also the reporting of it to our entire organization,” said Anselm Kia Peng, Sr. Director, WW Customer Success.

Upon receipt, surveys are routed to the appropriate business manager, who then determines the necessary course of action to close the loop with the customer and the issue. Negative scores mandate an immediate call from the management team, along with an alert to ensure the customer is contacted personally. If the issue goes beyond the confined support experience, the relevant business team and stakeholders are brought in to develop a remediation plan to close the gap, whether it is a product, marketing, or engineering function.

“NPX is tightly integrated with our case management system to provide a 360-degree insight into the overall customer experience,” said Piyush Patel, Director, WW, Customer Success. It drives us all to collaborate, close the loop externally with the customers and the gaps internally within the organization.”

While the CRM integration and closed loop process solved the responsive capture and handling of feedback, Pulse Secure still needed to find a better way to make the real-time experience and satisfaction metrics and the heartbeat of the customer more visible to the entire company.

To that effect, while the CX workflow was being integrated into the case management system, Moussavi and his team were working with Satmetrix to develop a plan to raise the visibility of CX and embed the results into every business users’ daily work experience.

One of the key criteria for selecting Satmetrix was its robust role-based and highly visual reporting with easy back-end controls that any user could pick up in minutes without extensive training.

Pulse Secure took immediate advantage of those features, publishing the real-time CSAT scores to the entire company and partners. By instituting daily reports to the management team, they could then easily drill down to investigate and uncover any issues or problem areas. The reporting also gave every business function a 360-degree view of the customer journey, and allowed them to quickly connect experience trends or spikes to specific touch points for each product, service and process.

The Satmetrix solution included:

- The native NPX connector for Salesforce.com and seamless integration with Pulse Secure’s case management system
- Closed loop CX feedback process
- 1,100 – 1,200 monthly transactional surveys
- Role-based reporting and real-time alerts and notifications
- Daily reporting of customer experience data to the company and partners
- Text Analytics for verbatim comments
- Cool-off feature to determine survey eligibility

RESULTS

MAKING QUICK WORK OF EVERY CASE

In Pulse Secure's line of business, customers have short memories, and if a provider can't solve their problem quickly or give them the feature they want in the next update, they'll find a competitor that can. For Moussavi and his team, the decision to go with Satmetrix was an easy one, as they believed it gave them the best opportunity to use the feedback they received to improve the customer experience and bring better products and faster service to the market.

“With Satmetrix we've been able to increase our NPS score by 45 points since launch to the end of 2016.”

**– Payum Moussavi, VP, WW
Customer Success**

A little over a year later, the results bear that confidence out. With the Satmetrix CEM program in place, they've been able to raise their NPS score 45 points since launch. And today, customer experience is a core part of the company DNA and CEM plays a key role in determining Pulse Secure's direction and business strategy.

On average, Pulse Secure sends 1,100 – 1,200 transactional surveys a month. It also has several listening posts in place – such as social media and user forums – to supplement the survey data and give them a richer and more complete view of the customer experience and sentiment.

“For us, the CX process operates like an audit,” Patel explained. “It tells us how we're doing: what's wrong, what's good, what's working and what isn't. Ten to 15 years ago, you had to have an active customer support contract to get feedback. Now with social media and other public customer forums, you're going to get their feedback regardless. And it's a great thing because you want to hear it, and get all the challenges and opportunities right from the source.”

In addition to immediately closing the loop for individual customer issues, the insights Pulse Secure gains from that feedback help to strategize the company's roadmap and play a daily role in how it assigns work and approaches processes.





RESULTS CONTINUED

According to Moussavi, every service Pulse Secure offers is influenced somehow by the feedback process. In fact, one of its recent service offerings, called Remote Installation Service, which provides customers with a block of live support help during onboarding, was created as a direct result of the insights generated from this CEM program.

The insights also helped them with the development of their knowledge-centered support system. With the help of the feedback collected, they now have the data needed to help customers solve system-wide issues faster, either by creating and proactively pushing out knowledge-base resources or by letting customers know what logs or information they would need to collect in order for the support techs to quickly resolve the problem.

In a little over a year, Satmetrix helped Pulse Secure accomplish the following results:

- Improve its NPS score from -5 to 40
- Increase survey response rates
- Completely close the loop on customer feedback
- Reduce support resolution times and cost
- Helped them identify and remedy numerous systemic customer experience gaps
- Better communicate and engage employees and partners with NPS and other experience metrics
- Drive improvement and the creation of new and better products and services

WHAT'S NEXT?

DRIVING CUSTOMER EXPERIENCE DEEPER INTO THE COMPANY

Pulse Secure faced a unique situation having launched as a new company with 20,000+ customers awaiting support. While the transactional-based focus helped them quickly find their bearings, the company is now ready to expand the CX program into new areas.

Over the coming months, CX team members are looking to introduce relationship surveys, so that they can deliver the same 360 views of other business functions – such as marketing and engineering that they're now getting of the support organization.

They're also currently building out CX kiosks across their global offices, where real-time NPS scores, verbatim comments, and other experience metrics will be displayed for employees to view and use for discussion and brainstorming.

Ultimately, Pulse Secure believes its partnership with Satmetrix provides the tools, ideas, experience and platform to continue to help deepen the company's focus on customer experience and drive business goals.

"Our vision with SMX is a true partnership and not only as a vendor," Moussavi said. Satmetrix understands our business requirements, which allows us to deliver feedback efficiently, effectively and ultimately with great results. Our partnership with Satmetrix is critical to the success of our business here at Pulse Secure."





About Satmetrix

Satmetrix is the leading global provider of cloud-based solutions for managing and improving overall customer experience. As co-creator of the Net Promoter® methodology, Satmetrix combines unrivaled NPS expertise with a powerful, yet cost-effective SaaS-based software solution to provide continuous, actionable, 360-degree customer insights. Leading organizations of all sizes and across multiple industries use Satmetrix solutions to drive customer retention, improve customer affinity and maximise positive word-of-mouth to deliver overall improvements in customer lifetime value. With more than 1,000 deployments in 40+ languages, Satmetrix provides a holistic view of the customer experience and the necessary expertise to help accelerate customer experience program success.

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