

Nulogy closes the gaps with Customer Success



Nulogy delivers customer success using comprehensive customer profiles to engage with the right customers at the right time, improving the effectiveness and efficiency of their Technical Account Management team.

Solving the Toughest Supply Chain Problems with Technology

Nulogy provides software and services that allow brands and their suppliers to bring personalized products to consumers more quickly, safely, and intelligently.

In addition to its technology, superlative usability and user experience has always been an important part of Nulogy's success and growth strategy. Its technology solution connects and federates a matrix of organizations within the supply chain structure – brands, contract manufacturers and packagers, third-party logistics companies and retailers – so that they can better collaborate on, manage and react to the complexities of bringing personalized products to market.

Nulogy's technology platform is leveraged by users from various backgrounds with differing skill sets, and to ensure they get maximum value from the technology, it's increasingly important to understand who they are and what makes them unique.

In 2013, Nulogy began working with Amity to better organize and consolidate customer information to provide a system of record for their team of Technical Account Managers (TAMs). Although, Nulogy uses Salesforce for sales management, the TAM team was looking for an end-to-end customer success solution to better manage the post-sale customer lifecycle. They were looking for solution that was specifically built for SaaS customer success management.

Tracking Customer Facing Activity Improves Team Efficiencies

The customer mix for Nulogy is quite diverse, as they span multiple industry verticals and geographies. It is critical for every customer to receive immediate value and an exceptional experience using Nulogy's software, regardless of their background. That means the customer-facing teams at Nulogy need to have a pulse on every customer at all times. The team was juggling multiple applications to distill information about their customers and organize all of their customer service delivery, including trying to track every customer-facing engagement. Amongst the spreadsheets, planning and workspace tools, keeping customer data accurate and up-to-date was a big challenge. The team was missing engagement opportunities and inefficiencies were quickly surfacing.

After initially importing Accounts, Contacts, Opportunities and Product data using Amity's Salesforce integration, Nulogy began using Amity to further consolidate all relevant customer data, and ramped up their task and issue management initiative to track customer engagements. The integration continuously synchronized changes made in Salesforce and

pushed them to Amity, providing Nulogy with a single-shared consistent view of the customer and eliminating double entry for the TAM team.

Nulogy customized task types in Amity to conform to their process and for tracking purposes. These task types, along with a customized pre-defined list of topics, allow the TAM team to quickly identify the methods of engagement and the topics discussed most often with customers. By syncing support tickets from their Zendesk help desk system with tasks and topics, and providing the history of phone, email, and meeting engagements, all from within Amity, Nulogy and the TAM team can easily determine sales opportunities and eliminate executive oversight caused by incomplete data.

Once Nulogy had aced task and issue management, they expanded engagement capabilities by fully integrating their Gmail into Amity to capitalize on additional time-saving opportunities for the TAM team. With the Gmail integration, Nulogy has the most accurate and complete picture of customer engagements in a single source system of record.



Building Trust and Success with Customer Success Plans

Nulogy builds its brand credibility, not only on the ground-breaking technology itself, but also by ensuring its customers have exceptional experiences with it. To help with this, the company began introducing Customer Success Plans for each new customer. Inputs into the success plan framework were based on insights from the history of customer engagement information found in Amity. The customer success plan enables TAMs to work collaboratively with each customer to outline their goals and objectives, and to measure them by identifying and tracking engagement opportunities that align with customer outcomes. This puts everyone on the same page with the same level of expectations for customer success.

“Amity was able to provide a system that consolidated all of our relevant customer data. It was easy to use and fit our budget and needs. By implementing task and issue management, we were able to uncover insights that will help grow our business today, and by continuing to leverage customer data in Amity, we are discovering even more opportunities that our company can capitalize on.”
- Leo Leung, Director Technical Account Management

Working with Amity

The Amity partnership starts the day a company decides to evaluate the Amity platform. Partnering with our customers enables us to create a collaborative relationship and establish an invaluable feedback loop. As Amity uses Amity to manage its own customer success process, we can observe how our customers use the platform and through self-discovery identify improvement opportunities. But it is through creating a regular two-way dialogue with our customers, that we uncover our biggest wins - features and functionality that our customers identify that will continue improving their delivery of customer success and business value. A rewarding win with Nulogy was designing the Portfolio Health Dashboard - a feature that is important to all Amity customers today.

PRODUCT AND FEATURE INFORMATION



Amity provides scalable engagement for Customer Success. Nulogy has integrated Zendesk, Salesforce and Gmail into Amity, and used the Radar, Plan, Portfolio, and Reports apps to track all customer facing activity, implement task and issue management and introduce their customer success plan initiative.

Expanding Adoption and Increasing Customer Value

With easy access to comprehensive customer profiles in Amity, Nulogy can now identify the critical insights for determining customer health scores. By highlighting those individuals who haven't been engaged with and/or subscriptions coming due, the TAM team can mitigate risk and take early action.

Further insights into customer health will come from the activity tracking - capturing and monitoring usage of each customer - that Nulogy recently implemented. What started as a system of record for the TAM team has now grown into a platform that can assist the TAM team in expanding adoption of Nulogy's software and delivering customer value.

About using Amity, Leo Leung, Director, Technical Account Management says, "Amity has been instrumental in helping Nulogy find a solution to organize all of our customer engagements and services, and in helping us mature as a Technical Account Management department to deliver business value." Leo plans to use the Portfolio Health Dashboard from Amity in his strategic customer review with the management team - he now has the right metrics for predictable growth.

HIGHLIGHTS

SITUATION

Nulogy, with customers from various disciplines with differing skill sets, needed a system for their Technical Account Management team to track all customer facing activity so they no longer missed engagement opportunities with customers.

SOLUTION

Amity gives Nulogy a single pane of glass for every customer and the engagement insights and tracking capability to ensure long-term success of their software and its users.

IMPACT

Having an integrated system in Amity created an efficient work environment for the TAM team and revealed opportunities to mature their customer success processes to scale with the growth of the company while keeping existing customers loyal.

“As a TAM, not only do I have all the information about my accounts, I have a tool that I rely on everyday to prioritize my time and maintain focus on important customer issues and high-value tasks.”

Maheen Memon
Technical Account Manager