

EverTrue Increases Customer Engagement By 60% with GuideCX



EverTrue delivers data, software, and strategy so that fundraising teams can bring a personalized experience to every donor. Over 1,500 colleges, universities, and nonprofit partners around the world use EverTrue to engage alumni, raise money, track fundraiser metrics, manage portfolios, steward donors, and build fundraising programs.

PROBLEM

Scattered Customer Engagement, Difficult Time Management

Prior to using GuideCX, EverTrue lacked a formal platform to onboard their higher-ed and nonprofit customers. New EverTrue customers entered into the partnership with great energy and enthusiasm—which was often dampened by a clunky, slow, and manual onboarding process. EverTrue team members relied on email threads and dense spreadsheets to track customer onboarding, and a lot of time was spent on repetitive tasks like sending task summaries and manual follow-ups to keep customers on track during implementation.

As EverTrue hustled to onboard a steadily growing number of clients, the implementation team found themselves spending valuable hours writing detailed task reminders and follow-ups to customers. The overall onboarding experience was manual and low-tech, and didn't match the high-tech, one-click, automated nature of EverTrue's software. The slow onboarding process was frustrating for customers and required a significant amount of effort and time.

With a fresh perspective and new love for EverTrue's smart software, data, and strategy, Implementation Manager Naomi Ward noticed that the EverTrue customer onboarding process didn't match the rest of the smooth customer experience. She knew something needed to change (quickly!) so that the EverTrue implementation team could spend more time on what truly mattered: empowering fundraising teams to raise money for causes that matter.

SOLUTION

Increasing Customer Engagement by 60% and Decreasing Implementation Time by 43% with GuideCX

On her search for a great client onboarding platform, Ward looked for software that would guarantee better customer engagement, less manual onboarding, and cut down on customer implementation time.

Since partnering with GuideCX, EverTrue's implementation team has become 60 percent more responsive with their new customers. To improve the onboarding experience, EverTrue offers resources for customers within GuideCX, empowering customers to seek immediate answers on their own directly within the platform.

The EverTrue implementation team has also seen a 43 percent decrease in implementation time with their customers. Within a few months of establishing GuideCX, the average EverTrue implementation time went from 212 days to 121 days.

Most importantly, the EverTrue implementation team has been able to focus on forming meaningful relationships with customers, rather than pestering them with task summaries and email reminders. Customers' onboarding experiences now match their experience with EverTrue software, strategy, and services: quick, smooth, and user-friendly.

RESULTS

Unlocking Long-Term Support and Unforeseen Benefits

GuideCX not only drives value for EverTrue's customers but also helps them train and coach their own employees. The EverTrue implementation team has moved training documents and other internal resources to the GuideCX platform, streamlining the team's internal efficiency.

Additionally, according to Ward, one of the best parts of working with GuideCX extends past the technology: "The customer service is incredible. Having someone to go to when I'm confused who will tell me all about the newest releases and give me that support is invaluable." Overall, as both a client-facing and internal tool, the GuideCX platform has been a valuable investment for EverTrue. Ward and her team are excited to continue to learn new ways to utilize GuideCX's platform to support their higher-ed and non-profit customers.

TAKE ACTION

Ready to Take Client Implementation and Onboarding to the Next Level?

When it comes to your clients, you only get one chance to make a first impression, so make sure it's a great one by inviting, guiding, and engaging internal and customer implementation teams with GuideCX. Our platform reduces time to value, creates visibility, and saves time with automation, ensuring project managers and their clients get work done as quickly as possible. To learn more about how GuideCX can address your business needs, reach out to us and ask for your free 14-day trial to get started.

At a Glance

- Founded in 2017
- Over 50,000 project implementations
- Headquartered in Draper, Utah



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-NAOMI WARD-
Implementation Manager
EverTrue