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Groupize Reclaims 10 Days a Month to Support Significant Growth with GuideCX

groupize

Groupize provides reimagined meeting and management tools designed to simplify the end-to-end event-planning process. The cloud-based platform serves as an entry point and centralized hub for corporations to manage expenses, meetings, projects, and events. It also offers clients consistent enterprise workflows that allow for compliant venue shopping and booking, attendee management, reporting, budgeting, collaboration, and more.

PROBLEM

Unprecedented Growth and the Need for Repeatable Processes

In 2020, Groupize experienced a dramatic uptick in growth that left their company searching for long-term onboarding solutions. Although the growth brought amazing opportunities with it, it was also a major pain point for management as it reflected an urgent need to define a scalable and repeatable implementation and onboarding process for their clients. Historically, they had relied on Microsoft Word and Excel sheets to track progress and next steps. However, with such substantial growth, it was no longer sustainable—especially as they looked toward the future.

Because they expected even further growth moving forward, they didn't want to start from scratch or completely redefine processes. They needed a system that could not only streamline their procedures but also be easy to learn and adapt to. And they needed to find a reliable solution quickly.

SOLUTION

Fostering Customer Engagement and Defining Consistent Onboarding with GuideCX

In October 2020, after searching through offerings that handled client onboarding, the team finally decided on GuideCX—mostly due to the fact that the system had the precise tools they needed to create playbooks. Once they started working with the platform, they realized just how easy it was to implement a project with GuideCX. This was absolutely critical moving forward, as they needed instant support that would provide lasting solutions.

Although Groupize expected GuideCX to help them instill an excellent onboarding process, what they didn't anticipate was how much GuideCX would also help with their customer engagement. Customizable dashboards have fostered additional involvement—both within and outside of the organization. Plus, the GuideCX system has become a major differentiator during their kickoff calls, allowing them to put their best foot forward from the get-go.

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SaaS

Celebrating Long-Term Wins and Upgrades

As Groupize has continued to work with GuideCX, they've been shown time and again how well the platform complements their technology. According to Justin Peticolas, manager of implementation and onboarding at Groupize, GuideCX has fit perfectly. "We offer event technology designed for people who aren't event professionals," he says. "GuideCX offers very similar support: a project management system for anyone. You don't need to be a project manager to benefit from the software."

On top of the initial benefits the Groupize team saw by partnering with GuideCX—improved client onboarding and engagement—they also saw significant upgrades to their time tracking and reporting. This has been critical to their ability to manage their resources and sell customer success. They can easily set goals for support hours, analyze their metrics, and support more implementations than ever before—all through one powerful system.

"Our implementation average has shot through the roof, and we're saving time," says Peticolas. "We have an average of 10 rolling implementations at any given time, yet we're saving at least two hours a week per client due to the automation from GuideCX." That time savings equates to 10 days a month regained thanks to the automated features of the system.

Moving forward, Groupize can't wait to continue working with GuideCX. Not only has the system empowered them to provide more implementations than ever, but it has also allowed for complete flexibility. Both their internal team and clients can see in real-time how their project is changing. These benefits and more have made GuideCX essential to the team. Peticolas could not be more satisfied with the system: "I really couldn't do my job without this."

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.

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At a Glance

- Founded in 2017

- Over 50,000 project implementations

- Headquartered in Draper, Utah

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- Justin Peticolas -
Manager of Implementation and Onboarding
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