

WITH KEY SURVEY, INTEGREAT FOCUSES SALES PITCHES AND IMPROVES CUSTOMER SATISFACTION

InteGreat, based out of Scottsdale, Arizona, produces medical record-keeping software; their customers range from small practices to large outpatient clinics with dozens of MDs. Their solutions are highly customized and involve extensive service and support; they're at the high end of a very competitive market. It's a big decision for a prospect to choose a system like InteGreat's, with a lot of work involved – both for the prospect, and for all the potential vendors. To make everyone's decisions easier, InteGreat uses Key Survey.

“We ask our prospects how they see themselves using medical records,” said InteGreat manager Leonard Garcia, whose functions include marketing, purchasing and sales support. “We've created different surveys for doctors, nurses and others in the clinics, asking how inclined they are to use various functions, how interested they are in certain features. We're surveying them to find out if their needs are right for our product.”

If the prospective users' desires match with InteGreat's strengths, then that's valuable information to be emphasized during the sales process; the salespeople can show exactly how InteGreat meets the prospect's needs. If they don't – if it's evident that they're not interested in areas where InteGreat is strongest, for example – then InteGreat can tell that they're not likely to become a customer. They can withdraw their bid, sparing themselves a lot of work in the form of detailed studies and sales pitches.

InteGreat has been gathering this type of information for a while, but not always as efficiently. Before beginning with Key Survey in 2003, they used phone calls: employees would phone relevant prospect-company employees and ask them questions manually. Or they'd send out paper surveys, which would have to be mailed back – and then collated by hand.

“A typical survey would be thirty to forty people,” Garcia said. “I'd have to gather this information, manually key in each answer to an Excel spreadsheet. It was a very time-consuming thing to do. Key Survey takes about ten seconds to get you the analysis, the nice summaries and graphs.”

“It was the most intuitive and the most presentable,” he says of why he chose Key Survey out of the five packages he considered. “There was a very clean interface, with very nice reports. And it had features like, when you're building a survey, the ability to copy a question and then make another question out of it. You'd be surprised how few competitors have that, but to retype the whole question over-and-over is very time-consuming. You can copy the entire survey and just modify it for another purpose.”

InteGreat originally got Key Survey to help with sales presentations, but – like many other companies – they've found other applications for it, too.

“We like to refer to it as a solution looking for a problem,” Garcia said. “Because it’s good to use for any kind of information gathering need, whether it’s a survey or not.”

The two biggest uses outside of sales have been a customer survey, which goes out annually to three or four users at each of InteGreat’s twenty-five or so major clients, and a user-group survey, for getting feedback on InteGreat’s annual user meetings.

That’s been useful feedback. The user meetings, for example, indicated that people really, really liked a particular hotel – the Scottsdale Hilton – as well as various corrective feedback about speakers and subject matter.

Whereas the annual customer survey has led directly to significant performance increases. People complained, for example, that customer service took too long to respond on some of the more complex questions, so InteGreat set up a multi-tiered response system that has improved both service quality and customer satisfaction.

“We’re pretty satisfied with it,” Garcia said. “It’s got more features now than we can probably use, but I like how it’s still simple, easy to use, and very intuitive. It’s benefited us in a big way.”