



CUSTOMER SUCCESS STORY

**CITRIX**<sup>®</sup>

## Citrix Systems

Citrix Systems (NASDAQ: CTXS) develops products that allow anyone in the world to work and play from anywhere. The company is at the forefront of the movement to help information technology evolve from the traditional distributed-computing model to a simpler, service-oriented model that supports user choice, agility, and growth.

Citrix Systems' customers include the world's largest Internet companies and 99% of the Fortune Global 500 enterprises. Citrix Systems desktop virtualization, application virtualization, server virtualization, application networking, cloud computing, and software as a service offerings simplify computing for millions of users, delivering applications as on-demand services to any user in any location on any device.

**Headquarters** Fort Lauderdale, FL

**Website** <https://www.citrix.com>

**Industry** Technology

### Simplus Services



Advisory Services



Implementation Services



Custom Configuration



Change Management



Managed Services

### Salesforce Clouds



Sales Cloud



Service Cloud



Salesforce Billing



Salesforce CPQ



Pardot



Community Cloud

## The Challenge

The Citrix Online division's 80 global support agents provide first and second-level support 24/7 to hundreds of thousands of eCommerce and corporate customers, and field 10,000 calls and 9,000 emails each week. It was difficult for reps to access service and support records across product lines, hampering their ability to provide effective service. Customers sometimes had to call multiple reps to get help for multiple products. Fragmented customer information also hindered Citrix Online's marketing efforts and made it difficult to compile division-wide reports.

To modernize its service process, Citrix Online partnered with Simplus to streamline the service processes and consolidate customer information within Salesforce Service Cloud.

## The Solution

“One of the key pillars of our company is “Be customer driven.” Simplus helped us integrate all of our assets and user information in Service Cloud, so our reps now have 360-degree customer views.

- **Tim Maskrey** *Program Manager, Citrix Online*

Simplus worked with Citrix Online over a nine-month period to expand its CRM implementation, customize and deploy the Service Cloud, and integrate key data sources from operational systems. Specifically, Simplus did the following:

- Standardized business practices around Salesforce
- Deployed Service Cloud to account managers and support teams division-wide
- Implemented one consistent and flexible integration solution for Sales Cloud
- Imported more than two million customer records into Salesforce.com and consolidated data on customers with multiple products
- Created 25 new fields to capture customer interaction details and marketing information including trials, paid accounts, automatic renewals, promotion codes, and opt-outs for surveys, emails, and phone calls
- Made it faster and easier to generate divisional reports
- Built custom dashboards and reports to make it easy for Citrix Online to see real-time updates of key business and support metrics
- Developed and deployed an integration between Salesforce.com and customer databases within the Fusion environment, replaced a legacy system, and made modifications to Service Cloud to support the integration

## The Results

“ With our new customer service case management system, our customers are able reach the right resource in a timely manner, with much quicker problem resolution.

- **Tim Maskrey** *Program Manager, Citrix Online*

With the Service Cloud, agents from all of the company’s business units can now easily access complete information about each customer. They can also see a record of division-wide customer interactions for more informed and effective service.

- The average wait time, which once stood at over 10 minutes with abandoned rates over 30%, is now less than 2 minutes with a less than 10% abandoned rate.
- Customer satisfaction has increased from an average score of 8 (of 10) to more than 9, with each point representing an increase of 10–20% of total lifetime value.
- The average call time has decreased by 30 seconds, resulting in 5,000 minutes saved per week companywide (equivalent to 2 reps). Ultimately, this means that reps can spend less time on administration and more time helping customers.
- Citrix Online’s marketing team can now use the detailed asset information and account histories to better monitor activity and develop more effective campaigns.

With information consolidated in the Service Cloud, the division gains a complete view of product trials, usage, and issues. Billing and automatic renewal information supports improved planning and forecasting. Custom forecasts and dashboards show real-time views of key service and support metrics with historical comparisons. And with the reduced IT hardware and software costs of cloud computing, Citrix Online reached ROI in just 6 months.

10%

increase in CSAT scores

20%

increase in total customer lifetime value

30

second decrease in average call time

5000

minutes saved per week