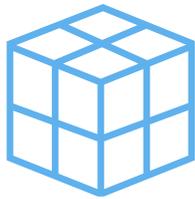




Retain Existing Accounts

Getting clients off to a fast, successful start



The Challenge

TimeTrade's Responsive Customer Engagement Platform is used by the world's most well respected brands in retail, banking and industries worldwide to deliver on their brand promise of a truly personalized customer experience.

As a rapidly growing company, TimeTrade generates lots of good information to share with clients. However, its Client Development Representatives often did not share the most current resources. In addition, when new clients missed the initial training — or new people joined the client's team — the reps frequently repeated training in separate one-off sessions. Product Marketing Manager, Chris Carroll, was eager to improve the client onboarding experience and increase the efficiency of the TimeTrade reps.



The Solution

Using Postwire, the Client Development Reps now simply copy a template and in minutes create a personalized resources page for each new account, where they also post the recording of the live training session. Best practice tips are added to the same page to keep clients engaged over time. And, as product information is updated, older tutorials and documentation are removed and replaced with the updated resources so that clients have the most current product information always handy. When a new person needs training, he/she is easily invited to share the account's resources page. The TimeTrade Account Manager is also invited, keeping everyone on the same page (literally).



The Results

A more efficient onboarding process and happy customers who tell others about TimeTrade.

Since TimeTrade began using Postwire for onboarding, the number of support calls from confused new clients has been significantly reduced and unnecessary training sessions eliminated. Clients can quickly find and review tutorials and supporting documentation whenever they need a refresher, creating a consistently positive onboarding experience clients rave about and that leads to more referrals.

TimeTrade President Gary Ambrosino:



I particularly like that Postwire allows us to see who is accessing the content we are sharing. It helps us gauge the overall level of engagement for each account.

Postwire Example

On Boarding Personal Page

Share This Page

Comments

Book Meetings
Start Here! Workgroup Crash Course

Posted 3 months ago by Chris Carroll

Click-to-Schedule Button Builder

Posted 3 months ago by Chris Carroll

Getting Started With TimeTrade | On Demand Webinar

Posted 3 months ago by Chris Carroll

Register for the Weekly Training Webinar

Posted 3 months ago by Chris Carroll

Add an Activity link to your email signature - Outlook : TimeTrade Support

Posted 3 months ago by Chris Carroll

Salesperson Meeting Frustrations

Posted 3 months ago by Chris Carroll

Ask a Question / Post a Comment

Post

timetrade™

Chris Carroll
Product Marketing Manager at TimeTrade



Tips:

- 1 Make the descriptive text associated with each content item be action-oriented or create a visual FAQ page by using the descriptive text to pose the question(s) each resource answers.
- 2 Be approachable: post fun photos and short bios to introduce your team.
- 3 Instruct clients to bookmark the page URL to keep your resources handy.
- 4 For more inspiration to use Postwire for onboarding, click **Postwire Templates** from the home screen and select **Client On-Boarding**.