

salesEQUITY Ups the Ante on Client Feedback and Account Planning

New feedback and action-planning tools motivate behavioral changes to grow B2B client relationships

BOSTON – [salesEQUITY](#), a SaaS-based client engagement platform that uses a proven quantitative methodology to measure and assess the health of individual client relationships, today introduced two enhancements to its client dashboard. These enhancements include Moment of Truth (MOT) surveys and Trusted Advisor Action Planning (TAAP), which strengthen account teams’ ability to measure, analyze and take action on their existing client relationships.

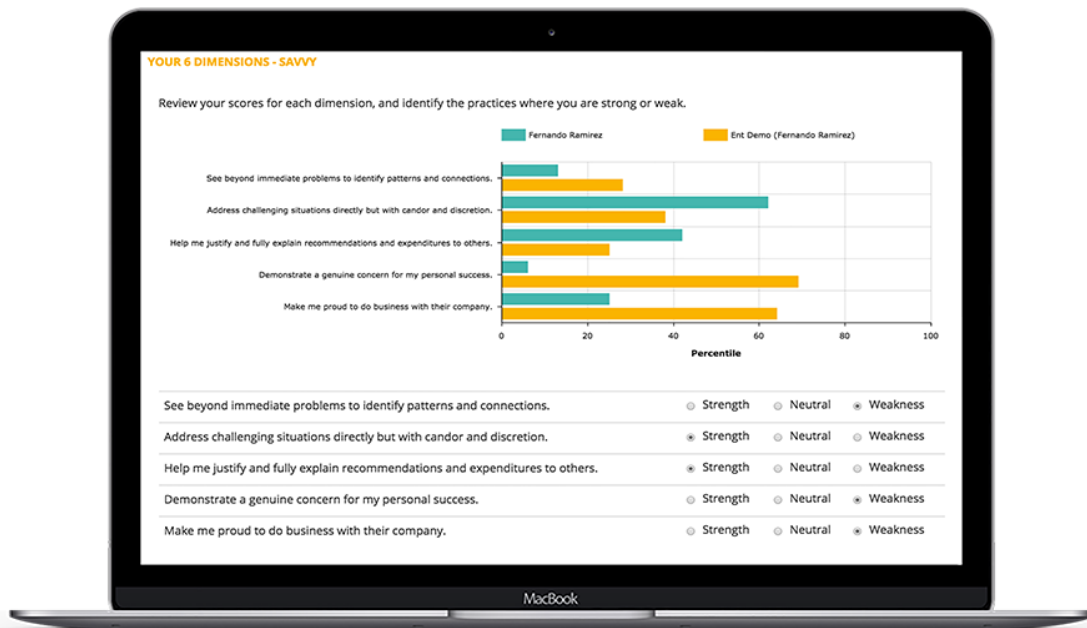


Figure 1 salesEQUITY Trusted Advisor Action Planning (TAAP) dashboard.

Customer experience will overtake price and product as the key brand differentiator by 2020, according to a recent Walker study. The most successful B2B account teams are already investing significant resources into retaining and expanding their existing relationships, to become Trusted Advisors for their clients.

“Companies don’t do business, people do, and strong, Trusted Advisor relationships are key to organic growth. Clients in this type of engaged relationship involve you earlier in decision-making, advocate for you internally and refer you externally,” said Tom Cates, founder and chief client officer of salesEQUITY. “The newest enhancements to our platform are designed to support B2B account teams in reaching the level of Trusted Advisor, so they can grow their client relationships for years to come.”

The Moment of Truth (MOT) survey, part of the “measure” and “analyze” phases of the salesEQUITY Relationship Assessment program, is a highly customizable way for account teams to measure client touchpoints between annual distribution of the salesEQUITY Relationship Assessment survey. Designed to capture specific moments in time, like a service ticket, new product or service launch, MOT measures



a client touchpoint in real-time, and indicates whether an individual client's feedback falls above or below the average of the other MOT survey respondents.

The Trusted Advisor Action Planning (TAAP) tool drives the "take action" phase of the program, enabling account teams to quickly organize feedback, define goals, objectives and assign tasks as part of an automated account planning process. TAAP plans provide the framework to customize specific behaviors that help account teams retain and expand their existing client relationships.

salesEQUITY is the culmination of two decades of B2B market research on client retention and engagement, process improvement and change management. The platform provides quantitative assessment and virtual coaching in one solution, with detailed insights on the health of individual relationships and actionable analytics to drive improvements. Since launching in April 2015, salesEQUITY has experienced steady growth in users and measured nearly 5,000 client relationships, while maintaining a best-in-class survey response rate of 45 percent.

About salesEQUITY

salesEQUITY is a SaaS-based client engagement platform that uses a proven quantitative methodology to measure and assess the health of individual client relationships. With data-driven analytics on the health of business relationships, as well as immediate coaching to drive improvements, salesEQUITY empowers organizations to transform undervalued accounts into trusted relationships that drive long-term retention, engagement and organic growth. To learn more visit www.salesequity.com.

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