

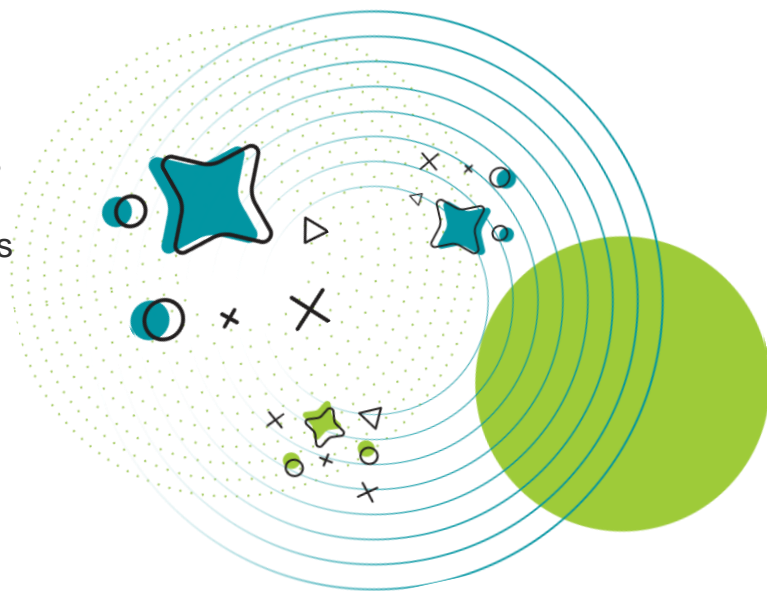
A blue-tinted background image of an office. In the foreground, a woman with curly hair is leaning over a man who is sitting at a desk and looking at a computer monitor. In the background, two other people are visible, one standing and one sitting. The right side of the image features a decorative pattern of white dots on a teal background.

ClearlyRated for Dynamics

Real-time CX management and survey automation

Key Features Overview

- ✓ Automatically sync your ClearlyRated survey data to Dynamics
- ✓ Data can be used in existing Dynamics reporting and workflows
- ✓ It can also be exported to other tools, such as Power BI
- ✓ Enables full survey automation with ClearlyRated
 - ✓ No contact lists or spreadsheets!
 - ✓ Check in at key touchpoints
 - ✓ Automatically see responses
 - ✓ Trigger follow-up activities
 - ✓ Suppression rules and QC built in
 - ✓ Prevent survey fatigue





Elevate Customer Satisfaction with Real-time CX Visibility

Dynamics 365

ClearlyRated

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ClearlyRated Entities

Accounts

Contacts

Survey Period

All

NPS
33.33%

RR
100%

Responses

Non-Responders

	NPS	Contact	Service Insights	Touchpoint	Completed Date
9 New Promoter	Jodie Christie, Purchasing Manager			Mid Assignment	4/17/2024 6:57 PM
5	Jodie Christie, Purchasing Manager	We've seen such a huge decline in t...	Onboarding	6/26/2022 5:13 PM	
10	Jodie Christie, Purchasing Manager	Service and results. Everyone is very ...	End of Assignment	11/12/2021 12:25 AM	
10	Judy Jolie, CTO	Service and results. Everyone is very ...		11/12/2021 12:25 AM	
9	Jodie Christie, Purchasing Manager	The response has been a little slow la...	Onboarding	11/16/2020 5:04 PM	
3	Jodie Christie, Purchasing Manager	Completely dropped the ball.	Onboarding	11/3/2019 5:28 PM	

Big Belly Burger - Saved Account

\$4,830,000.00
Annual Revenue

350
Number of Employees

NG Nathan Goff
Owner

SummaryDetailsClearlyRatedFilesAssets and LocationsRelated

Gain Customer Health Insights

Dynamics 365

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JC

Jodie Christie - Saved

Contact

NG

Nathan Goff

Owner

Summary

Details

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Related

Experience Insights for Jodie Christie

	NPS	Touchpoint	Service Insights	Account	Last Sent
	9	Onboarding	The response has been a little slow lately, but we still lov...	Big Belly Burger	11/16/2020 5:04 P...
	10	End of Assignment	Service and results. Everyone is very easy to work with ...	Big Belly Burger	11/12/2021 12:25 ...
	5	Onboarding	We've seen such a huge decline in the service. It has be...	Big Belly Burger	6/26/2022 5:13 PM
9 New Promoter		Mid Assignment		Big Belly Burger	4/17/2024 6:57 PM
	3	Onboarding	Completely dropped the ball.	Big Belly Burger	11/3/2019 5:28 PM

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ClearlyRated Survey Response

General Questions Related

Clark Wood

 Wayne Enterprises

Jan 2022

Onboarding

10

No Change

11/16/2020 5:04 PM

11/16/2020 5:04 PM

https://newt.dev.inavero.lan/e/qltsP_tw0jH75c7ql-S3Vn...

CI # ClearlyRated Dynamics Integration

Great team to work with - highly professional.

I Would Recommend Them to Anyone!

They really went above and beyond for my firm. I can't wait to work with them again!

Clark Wood

Angela Martin

Angela is the best customer rep I've ever worked with! She always has my firm's best interests at heart

Clark Wood

clarkwood@wayneenterprise.com: Jan 2022

CI # ClearlyRated Dynamics Integration

Cultivate a Culture of CX Excellence

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Share

clarkwood@wayneenterprise.com: Jan 2022 - Saved

ClearlyRated Survey Response

General Questions Related

Refresh

Flow

Question Name	Question	Answer
NPS Question	Based on your most recent experience, how likely would you be to recommend Dunder Mifflin Co to a ...	10
Issues	Have any issues you've had been resolved within 24 hours?	Yes
Quality	Dunder Mifflin Co _____ delivers high quality, error-free work.	Always
Value	The firm's services are _____ a good value, given the cost.	Always

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**Next Steps: Contact your CSM
to get started!**

<https://knowledge.clearlyrated.com/client-services/>