ClearlyRated Integrations

Integrate ClearlyRated's survey and analytics data into the software you already use everyday and reap the benefits.

Challenges in a world stacked with tech

In today's tech driven world professional service firms are using more SaaS vendors than ever. Unfortunately, their experience data is often siloed outside of their CRMs, ERPs, ATSs, and other platforms. Employees have to switch between vendors to find this data costing them time and energy. It can also mean more XM actions are left to manual processes rather than automation. These inefficiencies ultimately leave employees less prepared to find cross-sell opportunities and deal with at-risk business hurting the firm's revenue.

Solution through connection

ClearlyRated solves the challenge of valuable yet siloed experience data through technology integration. When employees are able to see the actionable insights we provide in the technology systems they use, they're able to operate more efficiently and effectively. This leads to better informed employees who are able to reduce churn and discover expansion opportunities. It also means more XM automation further freeing up the workforce to focus on what matters. Ultimately, better prepared employees with more focus leads to more revenue.

Key Benefits

- **Save** time, energy, effort and money

- **Access** experience data in the platforms you already use everyday

- **Automate** surveys sends in your existing platform

- **Address** client concerns immediately with automated replies and emails

- **Go** from data gathering to action, faster

- **Be prepared** with real-time insights and historical trends

- **Add** a layer of data validation and cleanliness

- **Identify** cross-sell opportunities and at-risk business faster and easier

Popular Integrations at ClearlyRated

ClearlyRated integrates with the industry's leading software vendors. Don't see the platform you use everyday? Contact us to learn about how we can integrate.

Salesforce

Sync your ClearlyRated data with the most popular CRM on the planet.

- Available for connection on Salesforce AppExchange
- View response data at the company or contact level
- Use and export ClearlyRated data within other Salesforce AppExchange apps
- Automatically send surveys to the right person at the right time
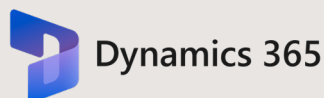
Bullhorn

Place client and talent experience data at the core of your strategy.

- Available for connection on Bullhorn's app marketplace
- Tab within Bullhorn hosts NPS® survey data, ticket tracking and more
- View survey responses from individual clients and talent
- Relieves need for every employee to have access to the ClearlyRated platform

Dynamics

Enhance the power of your ERP with business critical experience data.

- ClearlyRated data can be used in new and existing Dynamics workflows
- Export experience data from Dynamics to other tools like Power BI
- Use ClearlyRated data to track tickets within Dynamics
- Automate follow up emails for survey non-responders

Avionté

Enjoy actionable insights and survey automation in the powerful ATS.

- Survey data is pre-set for Avionté activies and tags
- Survey any talent associated with a job placement
- Drill down to see individual contact NPS scores
- Adds layer of data protection and cleansing to ensure quality insights

HubSpot

Feed experience data into your marketing and sales CRM.

- Automatically sync client and contact data to ClearlyRated from HubSpot
- Leverage experience data in HubSpot to drive marketing and sales strategies
- Use timeline custom event templates to sync survey responses to contacts
- Available for connection on HubSpot's app marketplace

Other Integrations

ClearlyRated also frequently integrates with WorkN, Target Recruit and Bullhorn for Salesforce. If you need to integrate with a custom app, just ask our team! We'd love to help you get set up.

FAQs

How do I get my current system integrated with ClearlyRated?

If you're already a customer speak to your CSM. They'll discuss your goals and then contact our Product team to get the process started. If you're new to ClearlyRated, welcome. Talk to Sales to see how our integrations can help you.

Will I have support setting up the integration?

Absolutely. Our team will be there to support you through the process. There will likely be some coordination with your IT team, but we will provide all the information they need and schedule support calls as necessary to ensure a smooth setup experience.

How much does the integration cost?

This will depend on which integrations you choose. There is usually a one-time setup fee and an annual recurring fee. Some integrations have a set cost while others are a percentage of your base package price.

What do you need from us to get integrated?

Every customer is different, but generally we'll need:

- Contact names, emails, and trigger dates (ie: invoice, placement started, email received, etc)
- What type of contacts need to be excluded
- A dedicated administrator on your existing platform

What if we're not confident in our data?

Don't worry. We help with data obstacles all the time. We can start small with only an email address and grow. Once employees see testimonials generated, they'll be inclined to participate. Our system filters out bad data and won't survey fake contacts. Plus, the surveying process helps clean data so marketers can operate more effectively.

"Integrations are an investment in increasing retention and expansion."

- Lacey Partipilo,
Vice President of Client Success at Xenium HR