



How tax prep productivity software company SurePrep boosts leads and conversions with customer stories

Software company SurePrep builds pipeline for sales and boosts conversions using customer stories created with TechValidate.



10%

Increase in conversions

40k+

Content views

25%

Content assets published

THE CHALLENGE

Building trust with skeptical prospects



Greg Pope
VP, Marketing

Tax prep productivity software company SurePrep works with some of the largest CPA firms in the world—a group of naturally risk-averse people. To win business, SurePrep needs to convince these skeptical prospects that the SurePrep software is a worthy investment.

To do this, SurePrep relies on positive stories from customers at every level of the company's marketing and sales efforts. Customer stories are powerful, but collecting and leveraging them at scale can be cumbersome and challenging. Previously, the company relied on customer service managers to ask customers for feedback and quotes for use in marketing.

“The process was not easy,” Vice President of Marketing Greg Pope says. “And even when we got positive feedback and quotes, it was challenging to turn that into easy-to-use content.”

SurePrep's marketing team wanted a faster and easier way to gather customer stories, one that would help them avoid overloading their go-to customer advocates with marketing-related requests.

“TechValidate helps us build trust throughout the sales cycle, which gives prospects the confidence they need to become customers.”

—GREG POPE, VP, MARKETING

THE ANSWER

More informed strategy and a boost in credibility

The marketing team was already using SurveyMonkey successfully to collect feedback from customers. Greg decided to also leverage TechValidate, SurveyMonkey's purpose-built solution for capturing and transforming customer feedback into case studies, testimonials, reviews, and more.

“It seemed too good to be true. TechValidate addressed each challenge we had and worked exactly as we'd hoped.”

—GREG POPE, VP, MARKETING

Greg and his team can use TechValidate to quickly and easily gather customer feedback, pull out the most important quotes, statistics, and case studies, and publish high-impact Voice-of-Customer content across channels. By filtering for attributes like role, industry, and company size, SurePrep can create collateral targeted to specific segments and touchpoints in the customer journey, ensuring that customers get the right information at the right time. The social proof gathered through the solution showcases how SurePrep stacks up against competitors and makes a strong case for choosing SurePrep products and services.

The information collected through TechValidate showcases the return on marketing investment and has bolstered Marketing's credibility among SurePrep's broader team. SurePrep's executive team has access to detailed TechValidate summaries, providing greater transparency and awareness of customer feedback. In addition, with content posted directly in Salesforce thanks to TechValidate's Salesforce integration, the entire team is more collaborative. This has seamlessly enabled SurePrep's sales team with more Voice-of-Customer content at their fingertips.

Company
SurePrep

Use case
Social proof

Product
TechValidate

Success factor
Increased conversions,
more leads

THE TAKEAWAY

A surge in positive sentiment

In three years of using TechValidate, SurePrep's sales cycle has shortened, and its leads have increased. By helping marketing and sales better identify when sales should reach out to prospects, the tool has enabled SurePrep to realize a **10% increase in conversions**. Greg says that the platform has played an integral piece in its marketing success.

As Greg continues to grow SurePrep's marketing and lead generation programs, he will continue to integrate TechValidate's timely, useful insights to create targeted collateral.