

# Betterment Leverages Stella Connect's Desk.com Integration to Increase Scale and Optimize Workflow

Betterment is a leading online financial advisor, helping people to invest and manage their money tax-efficiently. Betterment gives personalized advice based on each customer's individual financial situation and, most importantly, the customer's best interests. Then, the service invests the money in a globally diversified portfolio of low-cost, index-tracking, exchange-traded funds. Betterment is designed to help customers achieve the best possible expected returns for retirement planning, building wealth, and other savings goals.

As a company that is pioneering a new investment management movement, Betterment is committed to offering best-in-class customer experience. To ensure that service levels are consistently excellent, and to help keep agents motivated and engaged, Betterment turned to **Stella Connect**.

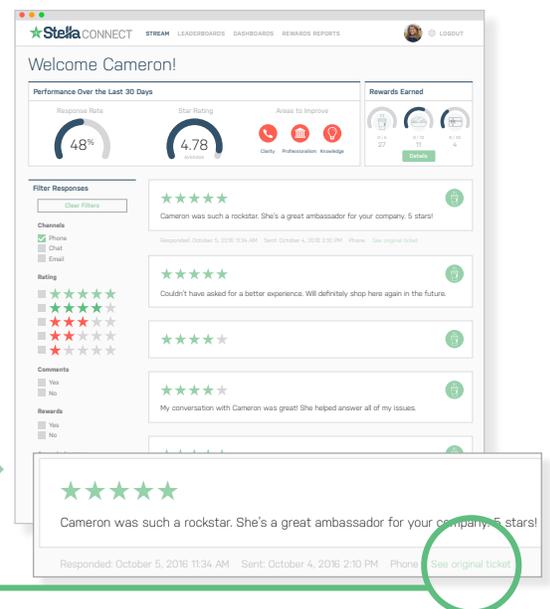
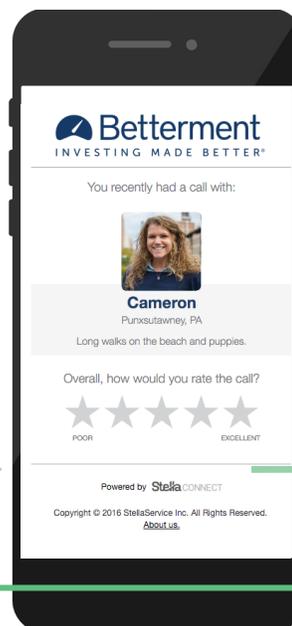
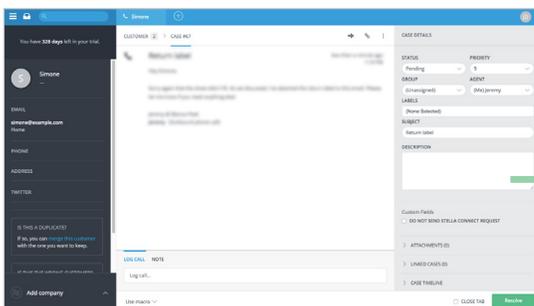


# From Manual to Automated Delivery

Betterment began trialing Stella Connect by manually triggering feedback requests following customer interactions. Starting with Stella Connect's zero integration delivery solution meant the Betterment team could be up and running with their trial immediately. The initial trial included half and quickly all, of Betterment's experience team, which enabled managers to test and scale the effectiveness of the platform right away.

**The Betterment team quickly saw the value of Stella Connect as a tool for driving service improvements and motivating front-line staff through positive reviews and customer-directed rewards.**

The reviews also provide fantastic coaching points personalized to the representative in real time. The company was ready to move to the next step and leveraged Stella Connect's integration with Desk.com to build the product into agents' existing CRM workflow.



Once cases are resolved, Desk.com triggers a Stella Connect survey, removing selection bias and workflow inefficiencies.

Customers receive the Stella Connect request immediately.

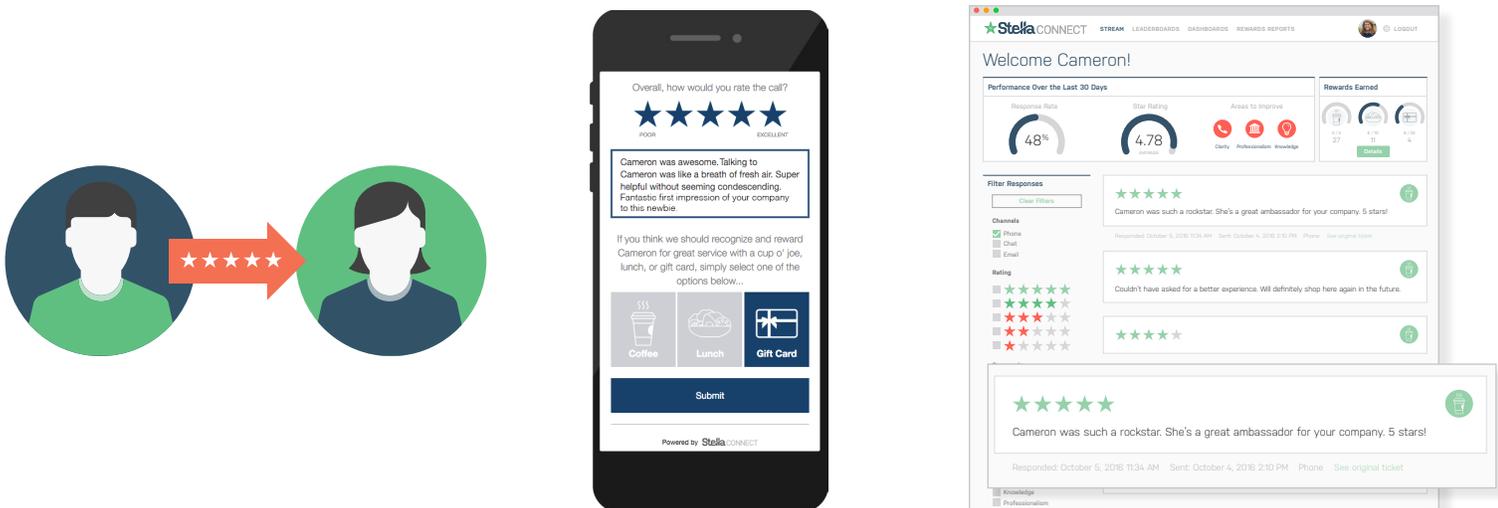
Feedback flows into Agent and Manager dashboards in real-time. Users can then easily link back to the original ticket.

*All screenshots are simulated and do not represent actual feedback.*

# Results

Following the integration, Stella Connect feedback requests are now triggered automatically once cases are closed in Desk.com following service interactions. Moving to fully automated distribution has enabled Betterment to immediately increase the volume of customer feedback being collected while ensuring that the product has no impact on agent workflow. The added ability to also trace the feedback to the source case via the API has even further enhanced the ability of the team to spot potential trends and follow up with unhappy customers instantly.

**Following integration, the Betterment team saw average daily feedback requests increase by almost 300%.** Following this significant scale, the Betterment team maintained consistently high engagement rates, leading to more quantitative and qualitative customer feedback to continuously improve their business.



Average response rates to Stella Connect feedback requests are between **35-40%**

Average reward rates are between **60-65%**

Around **50%** of all respondents leave a comment providing rich qualitative data

“ We quickly saw the value of Stella Connect after using the product with our customer experience team, so leveraging the Desk.com integration was a logical next step. The integration was easy to implement and we have seen an immediate uptick in the volume of feedback we are generating, which provides deep insights that help us continually monitor and optimize our service performance. ”

— **Tom Corwin**, Director of Customer Experience, Betterment