



Clozd Platform | Salesforce Integration Benefits

The Clozd Platform integration with Salesforce CRM automates the collection of win-loss feedback by enabling a direct feed of opportunities into the Clozd Platform. The integration streamlines the feedback collection process for win-loss interviews and surveys by reducing the amount of time spent collecting and sharing contact information.

Why integrate Salesforce with Clozd?



Reduce administrative time

No need to manually pull lists or manipulate data. The average Clozd admin can spend hours every quarter pulling a list of names for Clozd to interview, and it can take upwards of a month to complete this process in some cases. Connecting Salesforce with Clozd eliminates that process and allows you to focus on actionable insights rather than administrative work.



Monitor your win rate

See and analyze ALL data from ALL past and current won and lost opportunities to know your accurate win rate and track how it changes over time. This will allow you to answer questions such as:

- What is our organization's overall win rate?
- In which quarter does our organization have the highest win rate?
- What industry is our organization most successful in?



Real-time and continuous feedback

The Salesforce integration allows for a continuous stream of win-loss insights flowing back to all relevant stakeholders.

- The integration shrinks the amount of time between opportunity closed and feedback gathered.
- Clozd is able to speak with buyers about experiences while those experiences are still fresh on their minds.
- Clozd clients are able to read feedback on deals more quickly empowering teams to take action sooner.



More secure

No more emailing lists or uploading lists to a cloud drive. Clozd is SOC 2 compliant, so you can feel confident knowing that your data is flowing to a safe and secure location.

Contact your Clozd consultant if you have any questions or to start integrating with Salesforce.