

# Rival's **Action-Triggered** Insights

Most marketing and insights teams are working in silos, gathering large amounts of customer-related data that are stored in different systems.

Imagine the level of personalization your customers can experiment if those teams combine customer opinions with transactional data from CRM and Marketing Automation systems. Imagine the possibilities of having research and marketing programs orchestrated around timely events in the customer journey, tailored to each individual customer needs.

## Use Cases for Marketers:

- Higher brand engagement
- Personalized marketing content
- Tailored demand generation campaigns

## Use Cases for Researchers:

- CRM as the brain for the Voice of Customer Program
- Personalized research leveraging customer data
- Timely survey gather in-the-moment insights

## Problems:

- **Low response rate:** People are less willing to answer surveys when received days after their experience happened or by getting it in their emails, which are rarely opened.
- **Compromised quality:** The more significant the gap between when an event happens and when the participants provide insights, the lower the insights' accuracy. People do not remember details of their experiences as the time goes by.
- **Operational inefficiencies:** Insights and marketing teams spend hours trying to schedule survey distributions to reach participants when a specific event happens, but they fail to do this effectively.
- **Disconnected, unsynced data:** Customer data is captured and stored across multiple systems in the organization, and brands miss the opportunity to have a holistic view of their customers by not centralizing and connecting all the data in one source of truth.



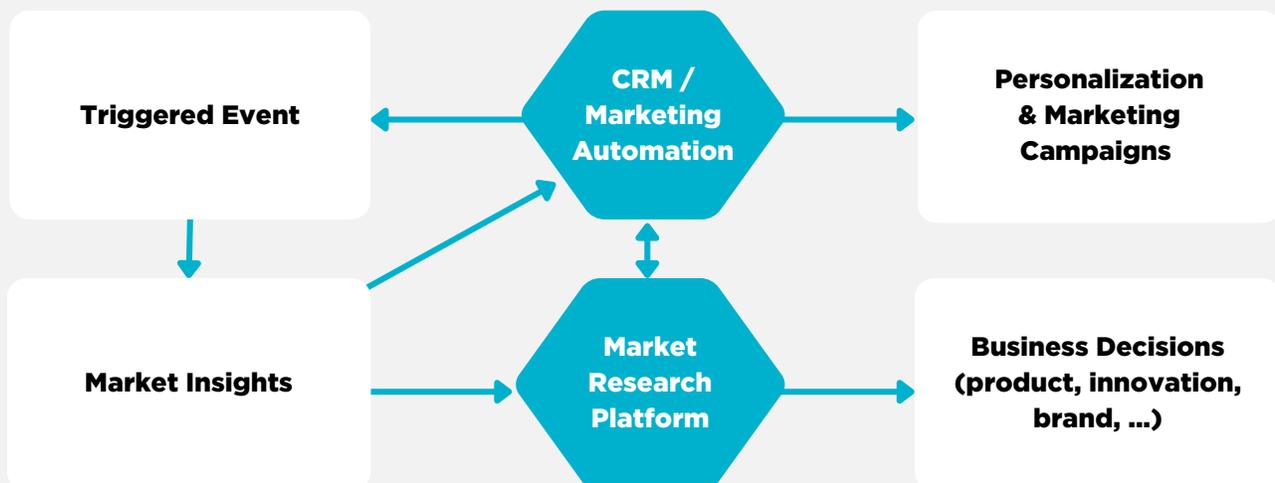
Many see the opportunity enabled by a more integrated perspective, including integration of internal data with custom research data to put primary data in context and possibly put a more human face on internal data.

2023 GRIT Business and Innovation Report



## Solution:

- Use our APIs to tie systems together and benefit from an experience that simulates a “virtual researcher” watching for someone to do something and then waving at them to get their attention to ask: "Hey! Can you spare 3 minutes so that I can ask you why you just did what you did?"
- Automatically deploy surveys when specific actions happen in your CRM, such as a new purchase, negative feedback, or intent to buy a product or service.
- Trigger surveys directly from events on Rival’s Platform, e.g., welcome chat surveys
- Send customers a welcome chat survey immediately after they join an Insight Community or ad-hoc research study (or on a 24-hour delay) to keep participants engaged and make them feel like they are talking directly with your brand.
- Update profile variables in the Rival Platform by calling our APIs. In turn, we can automatically send a chat invitation to talk to you about the event actively occurring in their CRM!
- Expand ways of gathering timeline insights by embedding QR codes with survey links to product packages, event booths, and physical stores. Customers scan and answer on their phones from anywhere.





## Benefits:

- **Customer journey:** Be in your customers' pocket through their customer journey, gauge levels of satisfaction and gather vital takeaways.
- **Increased business impact:** Drive better decisions by getting more authentic and contextual data from in-the-moment insights.
- **Customer understanding:** Enrich customer understanding by connecting customer research data with transaction data from your CRM.
- **Personalization:** Connect Rival to your marketing automation system to run personalized campaigns and more robust communication strategies. Leverage profile attributes and any other insight collected for a specific customer or prospect.
- **Speed to insight:** Program surveys automatically distributed based on pre-determined actions. Sit down and focus on analyzing and driving meaningful insights.
- **Smart workflows:** Automate workflows and follow-up survey questions based on customers' responses and behaviours.
- **One source of truth:** Disseminate in-depth customer understanding across the organization by connecting research data with CRM data, having a unique source of truth.



Larisa Mats  
Consumer & Market  
Insights Leader



The Rival platform has replaced the need to invest significant resources into siloed, ad-hoc research projects. Brunswick saved thousands on recruitment and administrative efficiency by integrating directly to our CRM.



## Who is this for?

- Insight teams
- Digital teams
- Customer support teams
- Customer analytic teams
- Customer care teams
- CMO/CIO

## What to learn more?

Let's have a chat!

[rivaltech.com](https://rivaltech.com) | [reach3insights.com](https://reach3insights.com)

