



# Why Neat Chose Simpo to Drive User Adoption and Education

## CASE STUDY



“Without Simpo, users would come in, look around, and leave confused. Simpo has helped us increase user adoption and productivity, while saving us countless hours of development.”



**Jeff Gove,**  
VP of Operations, Neat



# Customer

The Neat Company (Neat)

## RESULTS

# 2,080 hours

saved in development time,  
leading to:

# 2X

faster time to get started,  
yielding a:

# 55%

decrease in support tickets

## SIMPO PROVIDED

- **Full integration** with 7 different applications within the Neat ecosystem.
- **Smart Walkthroughs** step-by-step walkthroughs welcoming users and explaining new features.
- **Targeted Announcements** to alert users to changes and updates
- **Universal Knowledge Search** to make existing learning materials easily searchable from one place
- **NPS & Surveys** to understand user sentiment and uncover ways to improve
- **Incredible customer support**



INDUSTRY  
Computer  
Software



HEADQUARTERS  
Philadelphia, PA

Neat takes the stress out of bookkeeping by giving business owners an easy way to scan receipts, manage transactions, and reconcile their books—all in one screen.

## Challenges

### Driving adoption of technology initiatives

For any implementation of new software to be successful (be it an in-house application, CRM, or ERP system) employees need a way to get up and running quickly.

That means ensuring that users always have access to help within these systems and streamlining the experience. When users are unclear on what to do next or how to do it, it complicates their life, adds extra steps, reduces productivity, and drives up the amount of human support they need to get started.

Understanding this, VP of Operations Jeff Gove was looking for a solution that would simplify all of Neat's systems, including their various internal applications and their CRM—Salesforce.

He hoped that by teaching new users how to use the software and making all knowledge resources easily searchable, Neat would be able to drive adoption and automate the education for its 193,000 users. Ultimately, Jeff sought to increase productivity to positively impact the company's bottom line.

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“Onboarding new users was a big pain point for us. They were stepping into our ecosystem without knowing how to get started or how to access help without turning to support—which put a huge strain on us internally.”

## Solution

### User onboarding and education made simple

Jeff seriously considered the idea of building out key onboarding processes in-house. He abandoned that notion when he realized the time and cost required, and the strain it would put on precious engineering resources.

He searched for a solution. That search led him to Simpo.

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“To build or replicate in-house a small subset of what we have in Simpo would take at least six months—once development could get to it. Realistically, we'd be looking at a year or more. Partnering with Simpo is simpler and more cost-effective.”

From implementation to training, Simpo makes work simpler for Neat users. Simpo is integrated with seven different applications within the Neat ecosystem, including their desktop app, native mobile app, and their CRM, Salesforce.

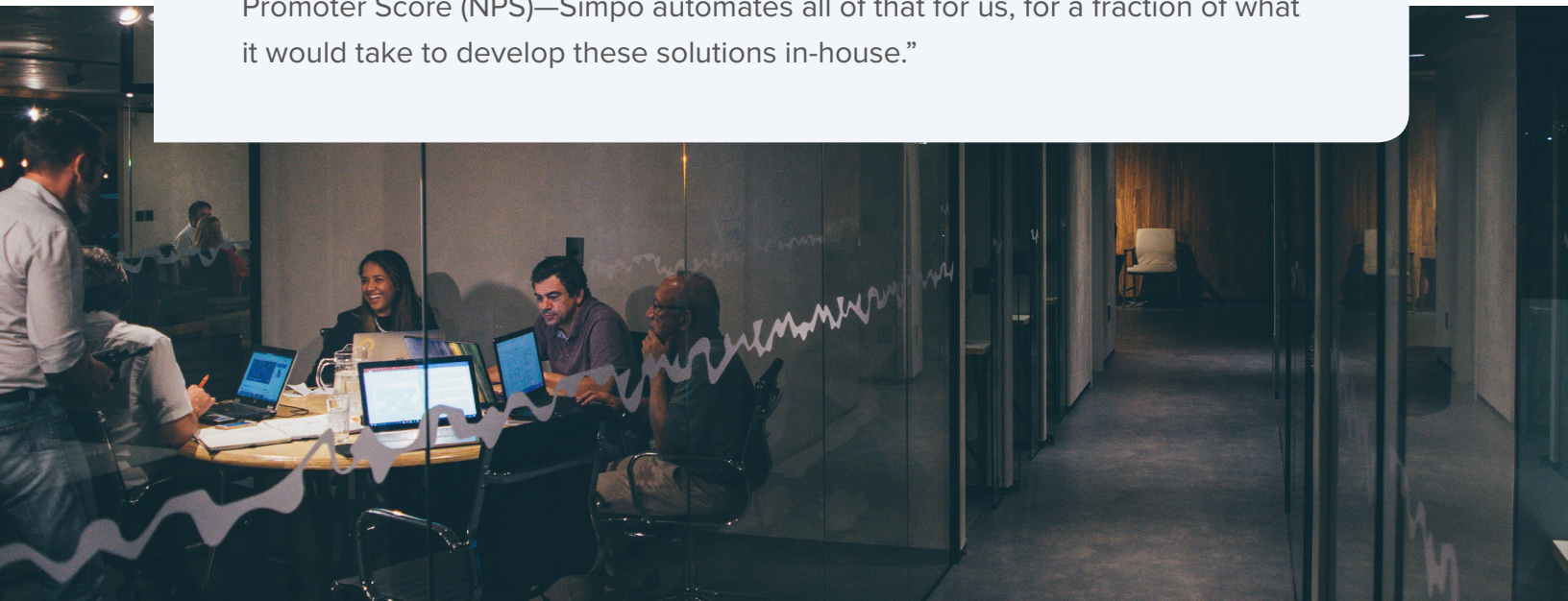
Across Neat’s applications, Simpo helps automate the education process for new users to turn every interaction into an easy-to-understand experience. Some of the features that make this possible:

- ④ **Smart Walkthroughs** guide users step-by-step through complex flows.
- ④ **Targeted Announcements** make it easy to alert users to specific changes and features and invite them to learn more.
- ④ **Universal Knowledge Search** makes Neat’s vast knowledge base easily accessible and searchable to all users using natural language.
- ④ **NPS & Surveys** enables Neat to understand user sentiment and uncover ways to improve.

Now, when Neat introduces a change, onboards new users, or needs to answer urgent questions about how applications work, they use Simpo to do so.

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“Walkthroughs, announcements, onboarding, collecting user feedback and Net Promoter Score (NPS)—Simpo automates all of that for us, for a fraction of what it would take to develop these solutions in-house.”



# Results

## Streamlined onboarding & education

By Jeff's estimate, Simpo saved Neat approximately 2,080 engineering hours to date and it has already had a massive impact on their ability to train and educate new users entering their ecosystem. In under a year, they...

- ④ Created 18 walkthroughs, completed over 10,500 times
- ④ Created 37 announcements, viewed over 288,000 times
- ④ Started over 28,800 automations with a 90% completion rate

In the past year, Neat has seen a notable uptick in user learning, productivity, and satisfaction—all of which translates to a **2X increase in software adoption since integrating Simpo.**

Simpo has also improved Neat's ability to collect and act upon user feedback. By implementing NPS surveys in their cloud application, Neat was able to automatically measure user satisfaction. Neat has used that feedback to improve their services.

As a result, **support tickets have decreased by 55%** and Neat has seen steady improvements to their NPS and customer effort (CES) scores. They closed out 2019 with a CSAT rating of 9.8/10 and a CES of 6.4/7—in large part thanks to the insight Simpo provides.



“With Simpo, we have all the tools we need to manage feedback and workflow around customer scores and our agents' follow-up.”



Curious to learn more  
about Simpo?

[Request a Demo Today →](#)