



How Simpo Helped Neat Reduce User Churn by 20%

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



The Neat Company

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.

HIGHLIGHTS

CHALLENGES

- Onboarding new users efficiently
- Announcing new features
- Collecting user feedback
- Making all knowledge accessible from one place

SOLUTION

- **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

RESULTS

- 2,080 hours saved in development time
- 20% churn reduction year-over-year
- 55% decrease in support call volume

Challenges

Finding a partner to help improve user experience

When Neat approached Simpo, they had been working with another company in the hopes of improving the on-site and in-app experience for users. Specifically, they wanted to:

- 1 Create clear, step-by-step walkthroughs that would assist users during the onboarding process.
- 2 Make their custom knowledge base easy to navigate and accessible from one place.
- 3 Create announcements to introduce new features, encourage adoption, and reduce churn.
- 4 Collect actionable feedback that they could use to drive improvements to the user experience.

Neat originally chose to work with a large incumbent in the digital adoption space, thinking that “bigger meant better.” However, months into the implementation, things weren’t going as smoothly as they had hoped.



“Using [the other platform] was time-consuming. It took a tremendous amount of training and there were hiccups during implementation,” says Jeff Gove, VP of Operations at Neat.

It was important to Neat that everything users interacted with felt like a native part of their environment. But making customizations to their then-current solution required significant technical effort.

“

“We can do a lot of development in-house: new features, bug fixes, etc. But we don’t have the people or resources to customize a complex digital adoption platform,” Jeff says.

“To make up for [that company]’s complexity, they gave us a customer success manager, but we were limited to talking to them only four times a year. That’s not what we needed,” he adds.

When Jeff realized that they weren’t getting the support they needed, Neat turned to Simpo for help.

“

“Simpo is the most customer-centric company I have ever worked with. Second to none. We left a giant company for Simpo—that’s a big deal,” he explains.

The difference between the two platforms was night and day. Simpo immediately began making life easier for Jeff and his team, and adoption was fast and painless.

“

“Ease-of-use between the two isn’t even comparable. You had to get certified to use parts of the other platform, whereas Simpo is simple to use,” he says.

Neat had found a long-term partner they could trust.

“

“We didn’t want a company that was going to treat us like just another consumer. We didn’t want a vendor, we wanted a partner—somebody we could continue to grow with. That’s what Simpo is for us,” Jeff adds.

”

“Simpo is the most customer-centric company I have ever worked with. Second to none.”

Solution

Smarter in-application onboarding and support for users

The first thing Simpo did was set Neat up with a dedicated implementation and success team. If Jeff or his team had any questions, they could reach out directly through their private Slack channel for help at any time.

“

“I love the success team. They’re easy to work with and their answers come quickly. You’ll never hear ‘we’ll get back to you in six days’—they’re there and responsive,” Jeff says.

Within weeks, Simpo was fully integrated into seven different applications within the Neat ecosystem, including Neat Cloud, their browser-based app, smart organization system, scan utility, mobile apps for Apple and Android devices, Salesforce, and even their legacy “desktop” applications.

“

“Implementation with [the other company] took months. With Simpo, we were up and running in weeks. Implementation was fast and simple, and they helped us transition every step of the way,” Jeff says.

After implementation, Neat was able to use Simpo to build out an exceptional onboarding experience.

This was crucial, because Neat had built a name for itself as a producer of handheld scanners for scanning receipts. As the company transitioned away from scanners and began focusing solely on its cloud-based bookkeeping software, they needed to ensure that users weren’t left in the dark.

“

“The first thing most people search for is ‘How do I scan?’ It was a big pain point for us,” Jeff explains.

With Simpo, Neat was able to manage this change successfully, dissolving confusion during the onboarding and in-app training experience. Neat uses Simpo’s Smart Walkthroughs to make it easy for users to navigate through complex flows and therefore reduce churn.

“

“Simpo’s easy-to-adopt approach makes building walkthroughs great. They crafted their platform with great user experience at its heart, so everything is intuitive,” Jeff says.

When new users click on Neat's demo, the first thing they see is a quick explanation of what Neat is and how it works. Users can then click on an announcement that takes them to the walkthrough. Simpo's Targeted Announcements make it easy to alert users to specific changes and invite them to learn more.

But, as Neat describes it, perhaps the most invaluable integration is Simpo's Universal Knowledge Search. This enables their users to easily access and search through Neat's vast knowledge base using their own words.

“

“From a success perspective, being able to deliver a great in-application experience is so important. Users no longer need to scour our support site or loose PDFs and emails to find what they need; everything is connected right inside of the app,” Jeff explains.

Simpo also allows Neat to understand user sentiment and gather actionable feedback through NPS & Surveys right in the application. Neat uses them for advanced insight into user satisfaction over time.

“

“Simpo's implementation of Net Promoter Score (NPS) at Neat enables us to attain statistical relevance in our NPS management. With Simpo, we have all the tools we need to manage feedback and workflow around customer scores and our agents' follow-up,” Jeff says.

“

“Simpo's easy-to-adopt approach makes building walkthroughs great. They crafted their platform with great user experience at its heart, so everything is intuitive.”

Results

More satisfied users & 20% churn reduction

In under a year, Neat's team created 37 unique announcements and 18 walkthroughs to guide users through their services. Jeff estimates that Simpo has already saved Neat approximately 2,080 engineering hours.

To date, over 193,000 unique users have interacted with Simpo experiences on Neat. As a result, customer satisfaction (measured through CSAT surveys and customer effort scores) has never been higher.

“

“We started out in negative NPS territory. With the Simpo integration and a number of strategic initiatives around user experience in the past year, our NPS is now well into the positive,” Jeff says.

“We implemented Simpo's toolset across multiple Neat client environments. With Simpo, we attained a 9.8+/10 CSAT rating, reduced support volume by 55%, and decreased churn rates by 20% year-over-year,” he adds.

The practical benefit of this is a 20% decrease in user churn year-over-year. Without Simpo, Jeff doesn't think this result would have been possible.

“

“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 time,” he says.

From a cost-value standpoint, there's no comparison.

“

“To build or replicate in-house a small subset of what we have in Simpo would take us 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,” Jeff explains.

With Simpo, Neat’s entire team finally has a solution they love.

Simpo is guided by one simple principle: software should work for the user, not the other way around. Jeff sees that spirit embodied in Simpo’s user-friendly platform, fast response times, and personal customer service.

It’s that level of care, he says, that makes all the difference.

“

“I’ve been working with Simpo for over two years now and every single experience has been positive.”

“

“With Simpo, we attained a 9.8+/10 CSAT rating, reduced support volume by 55%, and we decreased churn rates by 20% year-over-year.”



Curious to learn more
about Simpo?

[Request a Demo Today →](#)