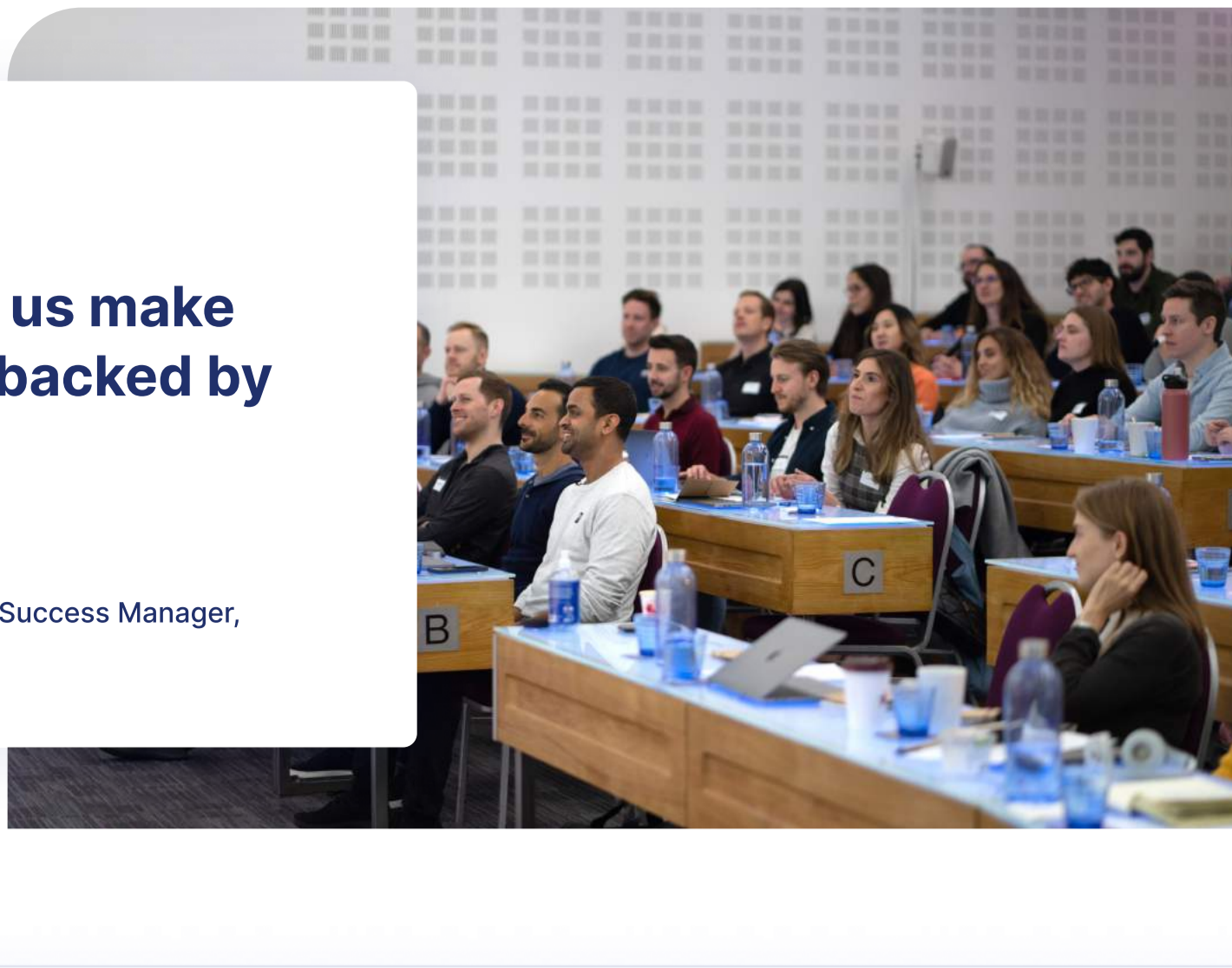




Wingman helps us make solid decisions backed by data.

Dan & Adam
Head of Global Sales/Customer Success Manager,
Fidel API



Headquarters
London

Founded
2013

Industry
Financial
Services

Company Size
51-200

What we do at Fidel API

Fidel API is a global financial infrastructure platform that enables developers to build programmable experiences at the moment a transaction occurs on any payment card.

Its tools are transforming how merchants and users interact by powering real-time, event-driven engagements, best-in-class loyalty and rewards programs and revolutionizing processes from reimbursements to expense management.

The main problem we solve with Wingman

Dan: I had used other kinds of call recording intelligence tools at another company. They have been really helpful, especially in a remote world where a much larger percentage of prospect interactions are on Zoom as opposed to in person. So I definitely wanted to bring a tool like Wingman to Fidel API when I started last year.

There were three problems that I was looking to solve with a tool like Wingman:

- I wanted to be able to hear the voice of the customer in different time zones — we have a team in the UK and in the US — without having to actually join all the calls live.
- I wanted to be present and focused in the meetings instead of taking copious notes.
- And lastly, I needed to have a way to go back to calls and coach individual reps.

Being in multiple markets at the same time and being able to give feedback to both the SDR and the AE team asynchronously with Wingman has been really helpful.

It doesn't matter what my schedule is. I can listen to a bunch of calls at 1.5x speed and provide actionable feedback to individuals. That is huge because it's hard to get schedules across different time zones synced up.

Adam: In terms of the customer experience and success side of things, we wanted to make sure that we were able to capture really good pieces of feedback about a product or customer service directly from the customer.

It's one thing to be able to get something in an email format but the ability to have a recorded call and send someone a snippet of that is really powerful.

It's the next best thing to actually having someone in the room with you. And call recordings help other non-customer facing teams get customer feedback and understand their thought process.



Being able to capture customer feedback on video and share that across teams is a really powerful experience.

Adam Moreschi
Customer Success Manager

How we benefited from Wingman

Dan: We have a very long sales process. We're an infrastructure company, so it's not like "a discovery demo and then move to contract" sort of scenario. There are a lot of moving pieces on the technical side even before a deal gets to Adam.

After we've signed a deal, we move it to our implementations team. They can go back and listen to the voice of the customer on Wingman and not just look at the notes on Salesforce.

At that point Adam's team would take over.

Adam: I think Wingman is helpful in a few ways regarding getting up to speed on different deals.

One is in terms of the actual handoff – there likely are a lot of calls with a prospect or newly signed customer before it comes to our team. So asking the sales person which specific calls might be helpful for us and then asking them to tag us in those has been useful.

Also, being able to watch the calls at faster speeds and jump around the transcripts is helpful too. Because a call could have 10 minutes of just introductions, which could be good if you're trying to learn more about the customer's personality or their interests outside of work or previous work experiences. But if you're just trying to get through the core of the use case or the product market fit, being able to scroll through the topics and jump to specific mentions like integration, timelines and pricing helps get up to speed quickly.

Wingman for non-customer facing teams

Dan: I think the other major problem that we didn't initially anticipate solving with Wingman was to get our product people more customer feedback without them having to be on all the calls, as Adam mentioned.

Sometimes you don't know when there's gonna be an interesting piece of information; you might not have a product person on the call when something comes up. But with Wingman, you can immediately tag them on the call and have them review it.

This has also helped us from a product perspective by helping us determine the actual problems that need to be solved. We can say to the product team that there are 30 different prospects or existing customers that have mentioned the same problem. That's impactful.



Wingman gave us a really good data-based way of making decisions.

Dan Plottner
Head of Global Sales

That was, again, something we didn't necessarily think about when we were first looking at Wingman, but it has been the reason for why we've expanded use of the tool across more than just the sales function.

Adam: We've been creating topics for mentions of certain keywords. This allows us to create filters for different teams that aren't always customer-facing and present on the calls. Wingman's technology has been able to sift through these topics automatically from prior calls.

We also tag relevant people on new calls so they can get email alerts. This way they're able to then create snippets from those calls, add them to a game tape and share it with their own team members who can then get alerts whenever there's something new added to the game tape.

Wingman has been really helpful to make sure that different teams get the feedback they need to explore new things.

Wingman for Fidel API's customer success team

Adam: One of our major challenges was training new team members who needed to get up to speed in terms of leading their own calls with customers. We also wanted to find a way to handle difficult conversations with customers – whether it might be about operations or something a bit more complex about our product.

Being able to record calls and add them to game tapes has been really helpful, especially for the earlier part of onboarding.

We've created a few different game tapes folders. The snippets in one folder relate to product-specific things like individual case studies. And we have another folder called 'voice of the customer', which is general feedback about either our product or our service.

That's been really helpful for new hire training as well as for providing continual feedback to our leadership. Because, as you can imagine, with Dan being across multiple markets, he can't always be available to attend all the calls across different time zones. But if he can watch a five-minute clip, it makes a world of difference.

Wingman for faster sales rep onboarding

Dan: Similar to what Adam does, I've created an onboarding program where reps can go in and watch certain kinds of product discovery and technical validation calls. I definitely noticed a difference between the new sales people that we onboarded in Q4 (2021) when we didn't have Wingman and in Q1 (2022) when we did.

The AEs that went through a product certification, which is taking a use case and discussing how Fidel API would solve their problems, and were able to review calls in Wingman, scored higher than the ones who didn't.

There can obviously be other factors involved here, but I definitely attribute a piece of the higher scores to being able to watch the actual ways that real customers are interacting and the kind of questions they're asking in the discovery process.

We can always role play, but having the ability to see the actual questions different customers ask is a lot more valuable.



I've definitely seen a difference between reps who did and didn't use Wingman when it comes to picking up on the nuances of our product and how it solves customer problems.

Dan Plottner
Head of Global Sales

So, would we recommend Wingman?

Dan: I would definitely recommend Wingman! It's 99.9% of the functionality of other tools at a much more attractive price. I also think the support that we've gotten is much better than what I would usually expect.

Wingman absolutely does what we need it to do. If you're a customer-facing team, I think it's just a must have. You have to have Wingman in today's global scenario to avoid being on a plane all the time or being in back-to-back meetings constantly.

I don't see how any modern sales organization could get away with not having a tool like Wingman.

Adam: I highly recommend Wingman. I have used other tools and to Dan's point, Wingman has a much more attractive price point.

Wingman's service and support has definitely been a leg up in the sense of being available for training, being able to take feedback and incorporate it at a much faster pace than other organizations that I've seen in the competition.



A tool like Wingman is a must have, whether you're a remote organization or if you have more than one office, and for teams that want to get involved in customer feedback.

Adam Moreschi
Customer Success Manager