

FEATURED SUCCESS STORY:
Account Planning & Forecasting for a Global Consulting Company with over 4500 users

PROBLEM STATEMENT:
Need for a seamless Account Growth Planning application integrated with the CRM to drive strategic and tactical actions to achieve higher revenue growth



CHALLENGE

- Account plans were more inward focused
- Global account managers were not able to view a comprehensive plan
- Poor linkage to client imperatives
- Manually intense effort in preparing plans every year
- No account intelligence available for creating plans
- No summary available across account plans



SOLUTION

- Migrated existing plans and implemented digital account planning
- Implemented global account plans with drill down to regional accounts
- Surfaced external insights linked to client imperatives and own strategy
- Implemented white-space to identify opportunities
- Created Revenue section to build 3 year objectives
- Proposed solutions aligned with client objectives
- Implemented consolidated account plan analytics



RESULTS

- Standardized account planning process, over 70% improvement in adoption of account planning
- Reduced time for client planning process by 4 weeks
- Consolidated intelligence used for decision making by Region, Industry and Service Line Leadership
- Global account collaboration
- Aided in global budget and account roll ups
- Account planning used as a living document

FEATURED SUCCESS STORY: Territory Planning for a portfolio company of a Fortune 20 Tech Conglomerate

PROBLEM STATEMENT:
Improving productivity of
sales team and helping
the Sales leadership
establish a guided selling
process to improve reps
chances of securing
growth through
acquisition of new logos



CHALLENGE

- Reps were not able to secure new logo closures on time, territories not optimized
- Inconsistent performance of Sales Reps, with most reps making less than 30% of quota
- No leading indicators or milestones to understand if rep was making progress
- Lost visibility into account activity if rep moved out or was re-assigned
- No consolidated intelligence to monitor progress of plans



SOLUTION

- Identified sweet spot, defined scoring and further segmentation based on internal and external data
- Established guided selling replicating success path of highest performing reps
- Surfaced curated external insights with access to over 75M web sources
- Set flexible and configurable plan formats tailored for each segment
- Analytics to show which reps were ahead and behind in key milestones



RESULTS

- More focused approach resulting in faster closure of new logo deals
- Cut down time to land first deal between 3-6 weeks
- Understood key relationships to navigate
- Inputs for tailored account based marketing based on client imperatives
- Whitespace analysis leading to better qualification of pursuits
- Sales Ops and Leadership got access to identifying reps that are ahead and the ones that needed coaching