

Maximizing Efficiency by 50% with Data-Driven Account Transfers

Industry: Information Technology and Services
Sector: Ed-Tech

The key challenges that the client was facing, including problems in their sales process, were:



Zero visibility on account performance



Inability to track account performance



A non-standardized account planning process



Ineffective monitoring of business

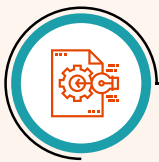


No defined procedure for account handovers



Confusion and chaos in the sales process

The Solution: Account Planner Starter by DemandFarm:



DemandFarm needed to provide a solution that took into account the client's in experience with account planning. DemandFarm thus proposed the Account Planner Starter.



The solution was delivered in a phased approach that helped users easily create and track account plans inside Salesforce. This approach helped the client overcome the learning curve associated with account planning. The client received a comprehensive resolution that addressed their challenges and was tailored to their needs.

Key Benefits: 50% Reduction in Time and Effort for Account Handovers

The implementation of the solution provided by DemandFarm resulted in

- ✓ Significant time and effort saving for the client.
- ✓ Increased collaboration on accounts to create effective growth plans
- ✓ Real-time updates on progress made
- ✓ Streamlined and data-driven account handovers
- ✓ Account handover process became more efficient due to decrease in manual input.
- ✓ 50% reduction in time and effort
- ✓ Streamlined account planning process.

Conclusion:

In conclusion, DemandFarm's Account Planner Starter provided a comprehensive solution for the client's sales process challenges.

The phased approach to account planning allowed for easy creation and tracking of account plans, reducing the learning curve for the client's inexperienced sales team.

The results emphasize the impact that a well-designed solution can have on a company's bottom line.

It also demonstrates the value DemandFarm can bring to businesses looking to streamline their sales process.

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