



Enhancing Sales Performance by 12%: A Fintech Industry Success Story

Industry: Information Technology and Services
Sector: Fintech

The company was facing several key challenges in their sales operations. Wanting to tackle their most pressing problems first, DemandFarm and the client decided to resolve the following:



Confusion and lack of clarity on the current pipeline



Unavailability of account knowledge in Salesforce



Inability to link or map contacts from associated entities



Lack of actionable reports to make practical decisions

The Solution: DemandFarm's Account Planner Starter



DemandFarm stepped in to provide a solution that transformed the client's sales performance.



All account profiles were highly customized to capture all customer information from Know-Your-Customer (KYC) documents. This greatly reduced the manual input required from users.



The first step was to set up an Account Heatmap, providing regulations and a services-wise pipeline spread. This helped Account Managers identify growth spaces.



DemandFarm also ensured the creation of reports tailored to the needs of the Sales teams.



Additionally, a parent-child hierarchy was created in Org Chart with custom icons to differentiate between parent and child accounts.

Key Benefits: Sales Performance Boosted by 12%

1. With the help of the visual heatmap, Account Managers were able to understand how their current services were spread across their markets. This helped them identify the opportunities available and harness them.
2. The adoption of Account Plans meant that manual effort was greatly reduced. This also helped teams to create dynamic and strong growth strategies.
3. The Sales Operations team now has access to the necessary reports which helps them understand the financial health of accounts. With advice, guidance and support from leadership, this improves the planning of their preferred business strategy.

Conclusion:

The implementation of the Account Planner Starter from DemandFarm represented a breakthrough for the client.

By resolving the four key challenges identified, the client was able to boost their sales performance by a significant 12% and streamline their sales operations.

With access to valuable account knowledge and meaningful, actionable reports, the Sales Operations team was better equipped to plan their go-to-market strategy and drive growth.

This project highlights the importance of identifying and addressing pain points in sales operations and the positive impact the right solution can bring to a company.

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