

ScaleFactor Achieves High Growth with Olono

INDUSTRY

FinTech SaaS Provider

CHALLENGE

Eliminate repetitive tasks and transform sales operations from reactive to proactive.

SOLUTION

ScaleFactor deployed Olono's Sales Activity Automation to drive growth, improve CRM accuracy, boost pipeline visibility and enhance rep productivity.

BENEFITS

- Improved sales rep productivity
- Single view of all activity
- Real-time understanding of opportunity cadence
- Improved deal coaching and strategy

The Challenge

"Olono is the new, smarter approach to sales execution. By proactively serving up sales insights and eliminating low-value tasks, the entire team's focus rises to meet our customer's more strategic needs."

There are 29 million small businesses in the U.S., many of which have turned to ScaleFactor to take the pain out of managing financial operations. By automating accounting tasks and translating financial information into usable business insights, ScaleFactor enables small business owners and entrepreneurs to focus on what they love: growing their business.

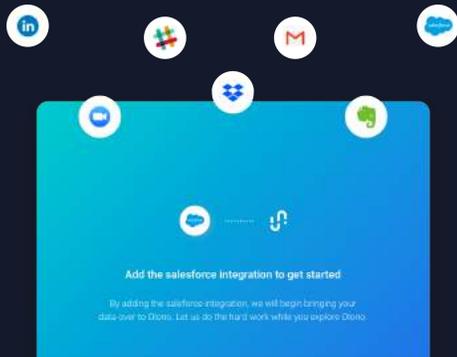
"The biggest obstacle in sales execution is not knowing the true status of each customer in real-time, and the root cause is the antiquated approach of relying on sales reps to manually enter opportunity data into the CRM system. Instead of endless forecast calls, and chasing down reps for updates, the new approach is to eliminate the low-value steps altogether. Using Olono, reps get time back to add more strategic value to their customers, and sales leaders get pipeline visibility they can trust. Olono delivers a new way execute high growth" - Jeff Gleason, Director of Sales

Like many fast-growing B2B sales organizations, ScaleFactor relied on reps to do manual data entry of sales data into the CRM system, resulting in incomplete and out-of-date pipeline visibility. Beyond the wasted rep time to do manual data entry, sales managers also wasted cycles rechecking deal status and re-vetting forecasts, instead of leading the execution of growth strategies.

ScaleFactor knows first-hand how machine-learning transforms its customers' accounting processes and wanted to apply this technology across their own sales organization—using A.I. and automation to eliminate time-consuming activities such as CRM data entry while gaining deeper visibility into pipeline activity, risks and sales effectiveness.

The Solution

ScaleFactor selected Olono Sales Activity Automation to automate data entry into its Salesforce CRM and stitch together its sales and marketing data—including key contacts, emails, meetings, documents, roles and other activity information from across its CRM, Google mail and calendar applications.



Work where reps want to work

A SaaS solution that integrates with more than 70 frequently-used sales technologies, Olono was deployed in hours and rolled out to ScaleFactor's complete sales team. Reps access Olono via a tab in Salesforce or on mobile, where they are greeted with a personalized experience that includes recommended Actions for their accounts.

From opportunity to close

With Olono, reps can quickly advance deals towards the close by completing Actions across multiple accounts from a single interface. Using A.I. and machine learning, Olono often predicts and automatically completes the action on the rep's behalf. As a result, ScaleFactor's CRM instance is now more accurate than ever giving sales managers complete visibility into the status of all opportunities, without having to track down reps.

Real-Time Reporting

Olono's ability to create and customize reports on demand gives Gleason and ScaleFactor's sales managers immediate insight into activity cadence by rep and account. With a single view, managers can see when activity is occurring as well as gaps and key risk indicators. ScaleFactor's most frequently used reports include: "Meetings scheduled for Opportunities forecasted to close in 30 days" and "Opportunities forecasted to close this week".

INCREASED REP PRODUCTIVITY

By reducing the manual data entry burden, reps have more time to actively engage with prospects and sell.

INCREASE PIPELINE VELOCITY

Complete pipeline visibility gives managers insight into sales activity to ensure process adoption.

REAL-TIME DEAL COACHING

By removing the tedious tasks, managers have more time and insight to help guide reps to the close.

