

t: +44 (0) 20 7193 0331
a: Missenden Abbey, London Road,
Great Missenden, HP16 0BD

t: +1 888 607 0490
a: 28150 N. Alma School Parkway,
Suite 103-484, Scottsdale, AZ 85262

e: marketing@visualinsight.com
w: www.visualinsight.com

CUSTOMER CASE STUDY



Global DataCenter Management (GDCM)

At GDCM, Sales Pipe Insight is driving best practice in sales process reporting.



www.gdcm.com

Challenge

- The need for greater communication between the global sales force
- The requirement to improve the accuracy of sales forecasting
- The need to become proactive in decision making, rather than being reactive to change
- Lack of a unified system that could collate and report on all relevant sales data

Solution

GDCM selected Salesforce.com, working with Visual Insight as the implementation partner. Although Salesforce.com provided much of the functionality that the company needed it was not designed to deliver the detailed and accurate reporting that GDCM required. The addition of Sales Pipe Insight gave them an advanced analytic tool to run alongside the new CRM system. Using the data captured in Salesforce.com, it offered enhanced visibility of the company's pipeline and provided a clearer picture of opportunities, allowing for greater forward business planning.

Results

- Ability to rapidly quantify the value of leads coming into the business
- Significant improvement in forecast accuracy and the quality of the sales process
- Consistent view of the best sales opportunities for closure
- Precise reporting and figures from all regions across the global network
- Ability to monitor the performance of the sales team and focus resources appropriately

“Sales Pipe Insight gives us a great view of the future growth of the business. It's removing the element of uncertainty from our pipeline and making accurate forecasting a reality.”

Owen Nisbett, Finance Director, Global DataCenter Management

Global DataCenter Management (GDCM) is a global software company, providing solutions that allow companies to intelligently manage power, forecast greenhouse emissions and optimise critical datacentre infrastructure.

Faced with the challenge of attempting to provide a clear picture of the quality of the sales pipeline, the size of business opportunities and whether or not targets would be reached, GDCM realised the value of transferring to an efficient CRM solution. The transition to Salesforce.com was a highly beneficial one for the efficiency of the organisation, but there was still an awareness that the data captured in Salesforce.com held more value that was inaccessible to those using it.

Sales Pipe Insight: unlocking sales performance potential

GDCM's decision to run Sales Pipe Insight alongside Salesforce.com from day one has meant that the company is now reaping the reward of actionable information early in the sales cycle. In particular, the significant improvement in forecast accuracy and the ability to quantify the value of opportunities coming into the business are invaluable to the sales team.

After a swift implementation process, Sales Pipe Insight is providing standardised best-practice reports for GDCM, unlocking the latent value in the data captured in Salesforce.com, and successfully addressing the common issue of being data rich but information poor.

With a sales team based around the world, Sales Pipe Insight is providing GDCM's management team with accurate performance figures across all regions, giving board members an independent view of the opportunities likely to be closed and the potential areas for new business. The tool offers a clear view of the progress of individual customers and opportunities and, importantly, staff performance in the sales process. It is also giving accurate indications of any potential errors in the forecast and is allowing proactive business decisions to be made by the board quickly.

“The level of objectivity Sales Pipe Insight offers is really beneficial,” says Michael Evans, CEO, GDCM. “It gives us critical information early in the cycle and allows us to act with intelligence. We are now able to utilise concise and consistent sales reports we can trust.”

GDCM are still in the early stages of using the solution, but the accuracy is already providing recognisable benefit, in particular when it comes to the review of monthly management accounts and forecasting for the months ahead. Visual Insight continually seeks to drive best practice in sales process management and its relationship with GDCM is providing a great opportunity for further development and tailoring of the Sales Pipe Insight dashboard in line with the needs of the business.