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## CUSTOMER CASE STUDY



# Sales Pipe Insight

Providing clear visibility of the sales pipeline at Valista



www.valista.com

### Challenge

- The lack of a unified system that could collate and report on all relevant sales data
- The need for insight into existing sales processes and new opportunities
- The need to provide accurate reports and insight into the sales process to the board and stakeholders
- The need to become proactive in decision making, rather than being reactive to change
- The need to improve the accuracy of sales forecasting

### Solution

The expertise of Visual Insight and its advanced analytics tool, Sales Pipe Insight, were brought in to run alongside Salesforce.com. This allowed Valista to populate the CRM system with all its historical and current data, and leverage the intelligence captured within it. Ultimately, Sales Pipe Insight offered enhanced visibility of the company's pipeline and provided a clearer picture of opportunities, allowing for well-informed decision-making and planning.

### Results

- Identification of the most promising sales opportunities
- Ability to pull precise figures from all regions across the global network and report with clarity to the board and wider stakeholders
- Ability to see all process steps and gaps, have constructive conversations early and take steps to improve the sales process
- Ability to monitor the performance of the sales team and focus resources appropriately
- Ability to introduce best practice approaches across the sales force

**Sales Pipe Insight has changed the way in which Valista, a leading provider of merchandising and payment solutions, approaches the sales process. With a clearly defined view of the sales pipeline, the team is able to track the progress of opportunities, almost in real-time. Armed with a definitive insight into the data contained within Salesforce.com, Valista is able to make proactive and intelligent decisions about its business activities.**

Valista specialises in the design, construction and delivery of a suite of open and scalable payment, settlement and service lifecycle management solutions, accelerating the buying and selling of digital goods and services over multiple channels.

Valista recognised a pressing need to establish a more efficient methodology for the sales process that would enable it to clearly identify strengths and weaknesses of approach, and drive potential opportunities forward with speed. The sales force previously relied on standard Excel reporting and templates, which offered little or no visibility across the sales pipeline or wider performance, and was a very subjective way of looking at the company's target forecasts.

Adoption of Salesforce.com to remedy the situation also stalled in the initial stages as the team did not possess the requisite knowledge to configure the system to the needs of the business. This made the investment somewhat redundant as Valista still had no reporting system and no real ability to see what would be achievable for the business on a quarterly and annual basis.

Valista wanted a system that would allow it to see and manage the pipeline and sales process accordingly. The adoption of Sales Pipe Insight provided a great opportunity to showcase Visual Insight's consultative expertise and knowledge of Salesforce.com and help the organisation realise the system's potential.

### Sales Pipe Insight: a constructive approach to the sales process

Valista is now reaping the benefits of the improvements that Sales Pipe Insight provides to Salesforce.com. Immediately, the business has been able to track the initial, selling and closing phases of the sales process and build a coherent picture of how the pipeline is progressing.

One of the key areas in which the management team has benefited is in its ability to constructively report to the board with clear and detailed information.

"Our previous reporting methods were an unproductive use of time. Reports to the board were done out of Excel and, whilst there was a representation of the deals out there, there was no ability to substantiate how the opportunities would progress. The trust and reliability Sales Pipe Insight has offered is invaluable."  
Kevin McGrath, CFO, Valista.

Sales Pipe Insight has also proved an invaluable tool in reporting back to those within the field, providing the team with the capability to look at the sales process in an increasingly rational way and constructively communicate through all channels. Any gaps in the processes and approaches being taken are clearly highlighted and the management team is now able to address any issues about progress and development very early on in the cycle. The ability to be proactive as a business has enabled the team to roll-out best-practice processes across its global network, which has, by proxy, led to improved efficiency and cost savings.