

How Impact uses WorkPatterns to achieve operational excellence



Vertical

B2B Software

Departments

Sales
Customer Success
Human Resources

Sales Assistant Users

35

Total Workpatterns Users

137

CRM

Salesforce

Joined WorkPatterns

April 2020

About

WorkPatterns helps teams operate more effectively through guided workflows and Sales Assistant is a module designed specifically for Sales Teams.

Impact's enterprise partnership automation software delivers actionable insights to activate rapid growth throughout the partner lifecycle.

Approach

Impact found WorkPatterns shortly after the COVID-19 pandemic forced their global organization to be completely remote. Impact used WorkPatterns across multiple departments to replace scattered meeting agendas in floating documents and email threads. Impact also adopted the Sales Assistant module to streamline sales operations, all in one place. By automating CRM action items for pipeline accuracy, sales managers could spend more time coaching AEs and progressing deals.

Using WorkPatterns for both 1:1s and team meetings, managers and employees alike are able to work asynchronously, collaborate on timely discussion topics, and easily track accountability for action items.

Sales Assistant enhanced this further for Impact's sales team by automating sales playbook rules and notifying AEs when their Opportunities were in violation. Impact's sales leadership created what we call 'nudges' to notify Account Executives and BDRs of missed opportunity next steps, tasks, and upcoming close dates.

WorkPatterns' Salesforce, Slack, and MS Teams integrations enable reps to take action and update Salesforce in real-time with a single button click. By streamlining the level of effort it takes to maintain the CRM, Impact was able to automate annoying admin work and focus both individual and collective team meetings on revenue-generating activities.

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290%

Improvement to CRM data accuracy resulting in more reliable pipeline management and forecasting

<2 days

Resolution time of CRM data issues is now 4x faster, resulting in near real-time pipeline forecast accuracy

1,700+

Salesforce action items completed via WorkPatterns Sales Assistant integrations, automating best practices

"WorkPatterns has helped our managers and employees work with clarity and alignment during the challenging transition to remote work. Sales Assistant also drastically improved our CRM data hygiene, which is essential for us because it informs decisions across our global organization. Automating this eliminated what used to be a manual and time-consuming activity.

Sales team meetings used to be dominated by pipeline hygiene reviews which would have been a nightmare as we shifted to remote work. Now, team meetings can focus on strategy and sales reps can focus their time on revenue-generating activities without opportunities getting lost in the shuffle. WorkPatterns has also helped managers and their direct reports stay aligned and connected. So much so that WorkPatterns is expanding outside of the sales team to other departments."

Marilyn Valace
VP of Sales, Impact