CIO 100
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MAXIMIZE SALES & MARKETING TEAM EFFICIENCY: WHY AUTOMATE?

Agenda

- Introduction
- Organizational Goal: Overall Operational Efficiency
- How We Did It
- Aligning with Sales & Marketing
- Bringing in AI
- Q&A

Our Goal

Improve internal alignment and workflows to ultimately eliminate 67k hours of manual work across operations.

Why?

We understood that efficient execution over the long term is the only way to build sustainable value within our control.

Empowering individuals to spend more time focusing on the type of work they like or want to do was especially important and directly impacts organizational culture – in a positive way.

The real meta deliverable was to get our team members to think differently and to not settle for the status quo.

How We Did It: Automation Domination

Think outside of the box about how we work both as individuals and as a collective organization through scalable solutions.

We used a combination of purchased and proprietary solutions integrated into our tech stack to help us enhance our cross-functional engagement:

- End-to-end process mindset
- Reduce manual errors and enhance quality of work
- Break down organizational silos
- Bring about tangible dollar savings

Areas to Consider

Improve revenue team efficiency:

- Bring speed to value for customers and our own teams through the use of Workato, 6sense Sales Intelligence, and Conversational Email solutions by focusing on Enterprise Business Process optimization.
- Set aggressive benchmarks based on existing metrics and ratios

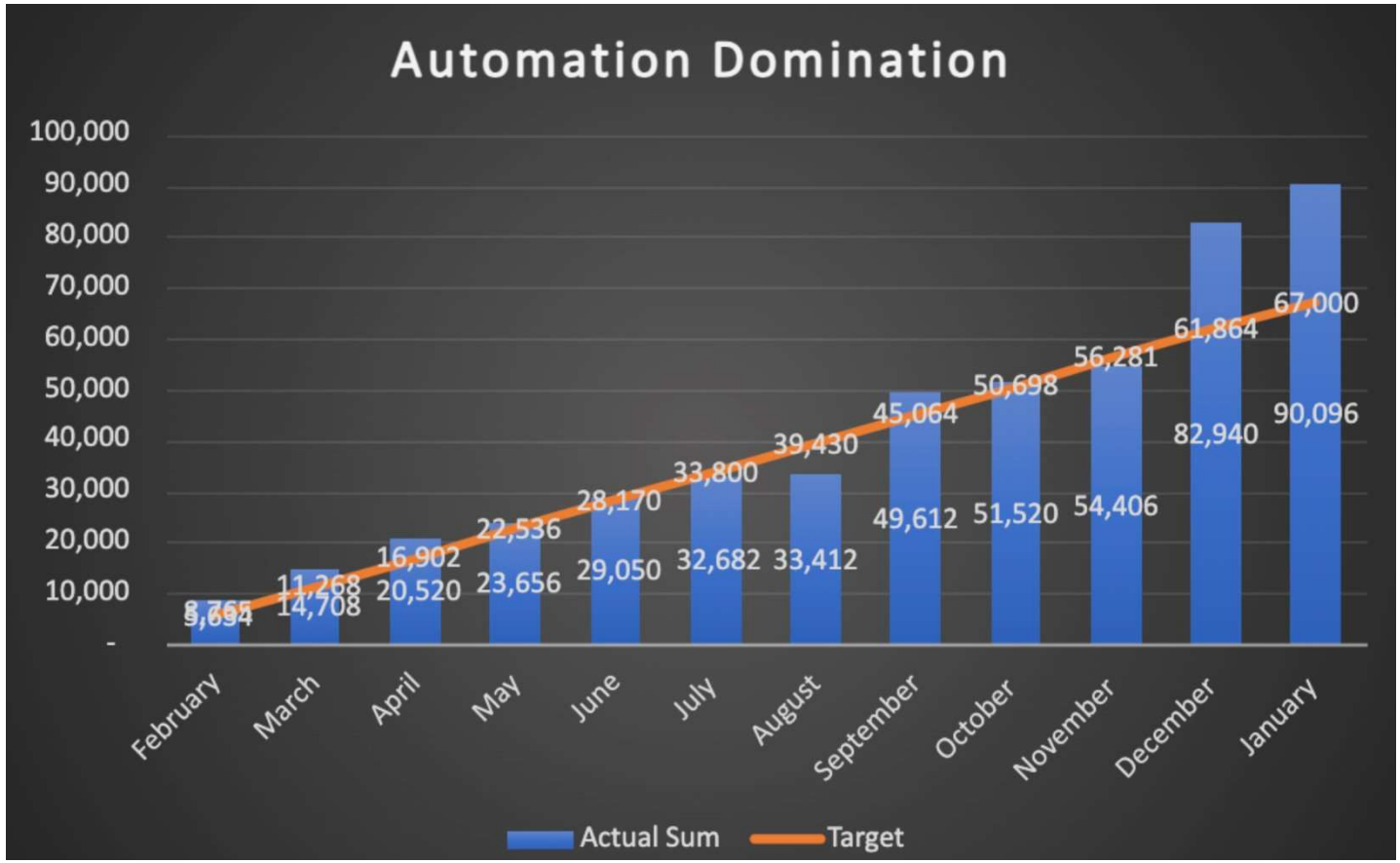
Clarify roles, responsibilities, and accountabilities:

- Reduce duplicative tasks, simplify navigation across the organization, and break down silos to improve transparency
- Ruthless prioritization on work that creates value for the company

Optimize tools and processes:

- Leverage value from the tools we already have and ensure that each employee was upskilled accordingly
- Challenge approaches, process and tools to consider the most efficient options

Results



We ended the year with:

- Over 91,000 hours saved
- Streamlined workflows and efficient processes
- Improved company culture

Automation Domination yielded impressive operational savings and efficiencies, but the success is an indicator of the accomplishments of each individual contributor as well.

While teams have been able to meet benchmarks and quotas, our people have also been able to free up their time from repetitive tasks.

Questions?

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