

## SUCCESS STORY

# Empowering Scorebuddy with Precision Sales and Revenue Insights



## OBJECTIVES

Scorebuddy, a leader in contact center quality assurance, partnered with Planr to refine its sales strategies, maintain forecast accuracy, and enhance revenue predictability.

Recognizing the need for a sophisticated approach to managing sales rep performance and revenue growth, Scorebuddy implemented Planr's AI-driven solutions to gain a competitive edge in a dynamic market.

## SOLUTIONS

### AI-Driven Sales Predictions:

Planr's AI algorithms provided Scorebuddy with monthly and quarterly sales predictions by rep for the current fiscal year, offering a clear distinction between new and existing business. This level of detail empowered Scorebuddy to strategize effectively and allocate supporting resources where they were most needed.

### Deal Dynamics and Pushed Deals Analysis:

Planr's tools analyzed deal push rates by sales rep, offering insights into sales cycle dynamics and enabling Scorebuddy to address bottlenecks proactively.

### Rep-Specific Forecast Accuracy Metrics:

Planr delivered precise forecast accuracy metrics by sales rep, fostering a culture of accountability and continuous improvement within the Scorebuddy sales and accounts teams.

### Granular Pipeline Analysis by Deal Tier:

Planr's solution dissected the sales pipeline, providing a tier-based analysis of deal sizes, time to close, and the current status of deals (open, being created, won, lost). As Scorebuddy moved its focus to the mid-market, this comprehensive view allowed Scorebuddy to refine its approach to each deal category, enhancing overall sales effectiveness and results.

## AT A GLANCE

### Challenges

- Complex sales prediction requirements
- Need for enhanced forecast accuracy
- In-depth pipeline analysis requirements

### Benefits

1. Implemented data-driven sales strategies
2. Increased forecast accuracy at sales rep level
3. Insights that helped drive sales team effectiveness
4. Identified hidden sales cycle bottlenecks

## **BENEFITS**

### **Improved Forecasting and Operational Efficiency:**

The detailed insights into forecast accuracy and deal dynamics enabled Scorebuddy to streamline operations, reduce uncertainties, and foster a data-driven sales culture.

### **Enhanced Pipeline Management:**

The tier-based pipeline analysis provided by Planr allowed Scorebuddy to tailor its sales tactics according to deal size and complexity, significantly improving the win rate and reducing the sales cycle duration.

### **Strategic Sales Planning:**

With Planr's AI-driven predictions, Scorebuddy optimized its sales strategies, focusing efforts on the most promising opportunities and accurately anticipating resource needs.



Planr's solutions have brought a new level of sophistication to our sales and revenue operations. As we shifted market focus, getting forecast predictability was vital. We were able to access insights that are impossible to get from Salesforce.

The detailed insights and predictions have not only enhanced our strategic planning but have also been instrumental in helping us achieve top spot in the G2 Contact Center QA software ratings and maintaining a 30% YoY revenue growth rate, which speaks to the growth and retention goals that Planr has supported.

**David Beausang**

VP Sales & Customer Success