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Adobe®

Industry – Software
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Challenges

- Providing sales teams with wide-ranging account data to support account planning strategies.
- Enabling multi-record editing from any device to accelerate account planning and improve collaboration.
- Creating consistency in account and opportunity data management across disparate teams and departments.
- Unifying customer account data from disparate sources into a single source of truth in Salesforce.

From Many to One

Creative software pioneer uses GridBuddy to gain important sales insights and streamline account planning strategies.

CREATIVE SELLING

Adobe is synonymous with creativity. For nearly four decades, the company has helped foster collaboration and world-changing communications among millions of global businesses and independent professionals through iconic software like Photoshop, the ubiquitous Flash, and PDF.

As the global competitive landscape began to evolve, company leaders wanted to adopt a more strategic, better planned, and value selling-focused approach to customer acquisition and retention. But data required for company-wide strategic account planning was stored in myriad systems, making it difficult to gain insights and deploy executive and sales resources where and when they were needed.

"Our account planning data was spread across numerous in-house systems, Excel spreadsheets, and PowerPoint presentations," says Marc Madenwald, Director of Sales Process and Productivity at Adobe. "We needed a way to consolidate all that information and give our account teams better, more reliable information to work from as they continue to build our business."

THE RIGHT SALES INFORMATION AT THE RIGHT TIME

Aligning a massive sales force in lockstep is no easy task. For Adobe, it means relying on powerful, multifunction systems such as Salesforce and SAP to store account and sales data for easy, reliable access to essential information.

However, in the past, account plans were housed separately from other data, residing in spreadsheets, presentations, and in various areas of the Sharepoint intranet. The result was that both inside and outside sales teams lacked a unified, central view of important account information like account opportunities or possible sales strategies to use for each account.

Often, this disconnect resulted in working with incomplete information that made collaboration and version control challenging, labor-intensive, and unscalable. Worse, to merge all the information into a complete, actionable picture often required users to spend valuable time copying and pasting information from Salesforce to the account plans, creating a variety of different approaches across the sales organization to data capture, data quality management, and reporting.

"Effective solution selling relies heavily on having complete, accurate information and getting it to the right people at the right time," Madenwald says. "We needed to modernize our sales processes and systems to give our people real-time access to the resources they needed to be successful."

SIMPLIFYING ACCOUNT PLANNING WITH STANDARDIZATION

Adobe turned to AppBuddy for help revamping and revitalizing its account planning and sales management strategies. Adobe chose GridBuddy because of its highly scalable, easy-to-deploy account planning grids that replaced the company's outdated manual entry processes. The service-based solution allows organizations of any size to unify data and workflows from any cloud into a single user experience in both Windows and Mac OS environments, dramatically increasing data management productivity.

"GridBuddy gives us the ability to move away from disparate and unstructured data sources and standardize our account planning process inside Salesforce," Madenwald says. "The seamless integration allows us to auto-populate account and opportunity details that used to require manually copying and pasting. It's a much more effective and efficient way of working that makes our jobs much easier to do."

With GridBuddy, Adobe sales leaders can quickly configure grids on a single account planning page inside Salesforce without requiring assistance from IT. The grids include the ability to relate opportunities with products, competitors, and assigned account teams—all presented in an editable tabular report view available to all sales team members in Microsoft Sharepoint, across virtually any mobile device.

In the past, updating information in Salesforce meant working with single list views and individual record detail pages. Editing multiple records could require more than 30 different page loads and over 50 unique actions.

With GridBuddy, any member of the sales organization can create, update, or delete multiple records from multiple objects in a single view. The intuitive grids also enable users to easily filter and sort data sets to their exact needs, bringing much-needed context to data in terms users will understand, not just complicated raw system components.

"GridBuddy simplifies our account planning workflow because it eliminates the need to view lengthy record detail pages that include many other account management fields that creates more work for our sales staff," he says. "It also has the extra benefit of eliminating unnecessary or redundant systems that add complexity and cost to our operations."

GREATER INSIGHT, AGILITY, AND PRODUCTIVITY

Adobe used GridBuddy to simplify and streamline its sales and account planning activities, while positioning its sales teams to be more agile and responsive to evolving demands of the market.

Unlike other solutions with varying degrees of editing capabilities and a multitude of different user experiences, GridBuddy provides a familiar, spreadsheet-like interface for rapid adoption across the organization without the need for intensive training.

More importantly, account plans are now standardized on a structured format that teams adhere to across the board, creating a consistent process and methodology for the company's value-based selling initiatives. Creating consistent workflows and expectations across the organization helps to ensure more effective communication, efficient collaboration, and better insights into critical account information.

> " GridBuddy has been a game changer for us. All of our salespeople—reps, managers, and executives—have real-time, reliable access to accurate account information and the insights they need to close bigger deals, faster.
>
> – Marc Madenwald, Director of Sales Process and Productivity, **Adobe Systems, Inc**.

Adobe is the global leader in digital media and digital marketing solutions. The company's creative, marketing, and document solutions empower everyone – from emerging artists to global brands – to bring digital creations to life and deliver immersive, compelling experiences to the right person at the right moment for the best results.
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AppBuddy is the industry leader in grid productivity solutions that simplify complex work, enabling businesses to create a single user experience from disparate business applications and data, and let users to get their work done fast. AppBuddy takes the enterprise systems you have and intelligently turns them into applications that are loved by end users.
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