Pivotree Saves Hours Updating CRM Data, Boosts Employee Satisfaction with GridBuddy Connect, From Validity.

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Pivotree is a global commerce and information management services firm with offices in North America, Europe, Asia, and Africa. The company's mission is to accelerate a world of frictionless commerce by delivering technology solutions that are practical, adaptive, and accessible.

As an end-to-end provider of commerce and master data management (MDM) services, Pivotree helps clients succeed in the ever-changing digital landscape, supporting them through platform selection, strategy planning, deployment, hosting, and ongoing training.

Over 200 leading B2B and B2C brands worldwide consider Pivotree a trusted partner—including many Fortune 1000 companies.

Empowering CRM users to access, update, and analyze their data— without wasting hours of valuable time.

Employees at Pivotree relied on their CRM (Salesforce) to guide business decisions, build strong relationships with customers and prospects, and forecast effectively.

But they frequently ran into usability challenges that prevented them from realizing the full value of their CRM software. While users could report on their CRM data, they couldn't easily update it. This hindered team productivity and frustrated employees.

"Since keeping the CRM updated was such a hassle, it became an ongoing cycle of reminding users to get it done," explained Kurt Thompson, Sales Operations Manager at Pivotree. These time-consuming updates often fell by the wayside in favor of more high-priority projects.

As a result, CRM users at Pivotree were often forced to work with stale data in fragmented views when forecasting, updating their pipelines, and quoting customers.

These problems became more apparent as Pivotree continued its robust acquisition strategy—acquiring new companies required users to manage growing volumes of data across multiple CRM systems.

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> Now that we can access multiple objects in Salesforce at the same time, users can see relationships between data points that they previously couldn't detect when viewing records in siloed views.

Kurt Thompson
Sales Operations Manager

"If employees had a slow week they could spend time updating data, but there were cases when they didn't have enough time to get it done," explained Thompson. "It didn't trump closing a deal, for example. Without a tool that made these processes simple, we couldn't always justify the time it took to keep data updated, and things fell off the wagon."

As their CRM use cases evolved along with their business, Pivotree employees needed a tool that let them customize their CRM to show streamlined views of the information each team member needed to do their job.

Unfortunately, these capabilities simply weren't available out of the box with their current CRM. Thompson and the Pivotree team knew they needed a better solution.

The solution:

GridBuddy Connect, the leading data productivity platform from Validity.

After carefully weighing their options, the team at Pivotree implemented GridBuddy Connect, the data productivity platform from Validity.

GridBuddy Connect shows records from multiple CRM list views and objects in one editable, spreadsheet-style view. This eased Pivotree's daily burdens for data management and enabled richer analysis across multiple systems and teams.

"The platform allows us to give our users very specific access that makes it really easy for them to update their information quickly," Thompson explained. "And because it's so easy, they're more likely to actually do it."

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A better relationship with their data—which led to time savings, higher employee satisfaction, and more accurate forecasts.

Thompson reports the GridBuddy Connect platform saves users hours every week updating data. Since these processes are now much simpler, they're easier to follow and enforce, which helps Pivotree maintain higher data quality.

"I have a series of data quality checks I run every month or so. I've started shifting those from reports in Salesforce into grids in GridBuddy Connect. This allows me to quickly see if there are data entry issues, and then go in and fix them without having to drill into the underlying Opportunity or Customer in Salesforce," said Thompson. "It's smoother and faster for me to fix these issues now."

The solution also facilitates better alignment across Pivotree's revenue and service delivery teams. To provide accurate quotes to customers—including what services Pivotree can deliver, at what price, and how quickly—the service delivery team needs to know which deals are nearing the end of the pipeline. On their end, the sales team needs to understand the availability of individual delivery teams to set customer expectations for onboarding.

"Having a solution like GridBuddy Connect allows both of these teams to access this information and keep each other updated. In the past, they had to keep these details top of mind or schedule phone calls and meetings to make sure everyone was on the same page," explained Thompson.

According to Thompson, GridBuddy Connect also improved the CRM user experience for the sales team. Now, sales and account representatives can better manage their pipelines and view deal data in the same format as the managers who evaluate it.

> **"There's never a shortage of requests for our sales team to provide more and more details on their opportunities so somebody can evaluate the pipeline," said Thompson. "Without a tool like GridBuddy Connect that makes it easy to add these updates, the job satisfaction of the sales team can really suffer. So it's almost like an employee retention tool as well."**

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> We're constantly changing and our CRM is too. Having a platform like GridBuddy Connect that keeps evolving and getting better builds our confidence that it's going to be useful for years to come.

Kurt Thompson
Sales Operations Manager

Pivotree's sales executives also leverage GridBuddy Connect to ensure their reports are accurate. "The solution provides sales executives visibility of the overall forecasts and the option to keep drilling down to see if variances from the expected numbers are justified by what they're seeing in the data," said Thompson.

Pivotree's Vice President of Sales, who is responsible for reporting forecasts to the rest of the executive team, can easily access and filter forecast and pipeline information by individual team, employee, or opportunity.

This increased access, control, and visibility empowers sales leaders to create forecasts they feel confident sharing with relevant stakeholders.

A unified view of data also leads to better coaching within the sales team. Now that Pivotree's sales leaders see the same data in the same format as the rest of the team, they can train new employees to provide more accurate forecasts.

Thompson reports these features and streamlined workflows ultimately resulted in more satisfied team members—invaluable as organizations across the country face a hiring crunch driven by the "Great Resignation."

About Validity

Businesses run better and grow faster with trustworthy data. Tens of thousands of organizations rely on Validity solutions – including Everest, DemandTools, BriteVerify, and GridBuddy Connect – to target, contact, engage, and retain customers effectively. Marketing, sales, and customer success teams worldwide trust Validity solutions to help them create smarter campaigns, generate leads, drive responses, and increase revenue.

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