How GridBuddy Connect Transformed Sales and Service at Validity, Inc.

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Validity

For over 20 years, tens of thousands of organizations throughout the world have relied on Validity solutions to target, contact, engage, and keep customers—using trustworthy data as a key advantage. Validity's flagship products—DemandTools, BriteVerify, Everest, Sender Certification, and GridBuddy Connect—are all highly rated solutions for CRM data management, email address verification, inbox deliverability and avoiding the spam folder. These solutions deliver smarter campaigns, more qualified leads, more productive sales, and ultimately faster growth. For more information, visit Validity.com and connect with us on LinkedIn, YouTube, and X.

The challenge: Workflow inefficiencies in Salesforce made pipeline management and customer service more time-consuming and less effective.

At Validity, Inc., efficiency isn't just a goal—it's essential for empowering high-performing sales and customer success teams.

However, like so many other organizations, their teams wrestled with frustrating workflow inefficiencies in Salesforce.

For Validity's sales team, pipeline management was a major frustration. Sales representatives wasted hours each week manually updating stale data and navigating complex Salesforce reports.

Colin Pratt, a New Business Account Executive, lost five hours per week just trying to keep track of opportunities, shifting between reports, and manually updating stale data. Forecasting was a nightmare. Without a real-time, holistic view of his deals, he was left guessing which opportunities were truly a priority.

Prospecting was worse. Identifying just three potential accounts took nearly an hour, requiring him to dig through multiple reports, track down past engagements, and manually cross-check information. On top of that, quoting was a tedious, multi-step process, forcing him to load and reload pages just to access necessary data. The constant navigation between screens made his workflow feel like an obstacle course—one that kept pulling him away from actual selling.

Validity's service reps dealt with their own set of challenges. Customer success managers juggled disconnected customer information, making it harder to assess risk and deliver proactive support.

Aja Sanders, Senior Manager, Customer Success – Data Services, and her team handle 50-80 open customer requests at any given time. Without a centralized view of customer data, every case felt like a scavenger hunt.

Aja and her team often spent too much time tracking down key account details, hopping between support tickets, usage reports, and past communications. Even updating case notes was frustrating—Salesforce's standard list views didn't allow for quick edits, so she had to open each case individually to make even the smallest update. Worst of all, there was no single source of truth for identifying customers at risk of churning. Instead, she relied on static, outdated Excel reports that gave her little insight into real-time customer health.

The issue wasn't a lack of effort—these teams worked tirelessly. The problem was the tools they had simply weren't designed to keep up with the speed and complexity of their roles.

Both teams needed a single source of truth to streamline workflows and improve decision-making.

The solution: A unified, actionable view of customer data in Validity GridBuddy Connect.

When Validity adopted GridBuddy Connect, it was like Salesforce finally started working for their teams instead of against them.

For Colin and his sales teammates, all key opportunity data suddenly lived in one, easy-to-navigate grid in Salesforce, bringing pipeline, related accounts, opportunities, contacts, and critical details together in a single view. They could now filter, sort, and prioritize deals based on stage and close date without building complex reports. The quoting process became seamless—CPQ (configure, price, quote) actions were embedded directly in their workspace, allowing the team to generate quotes, edit line items, and send approvals in real time.
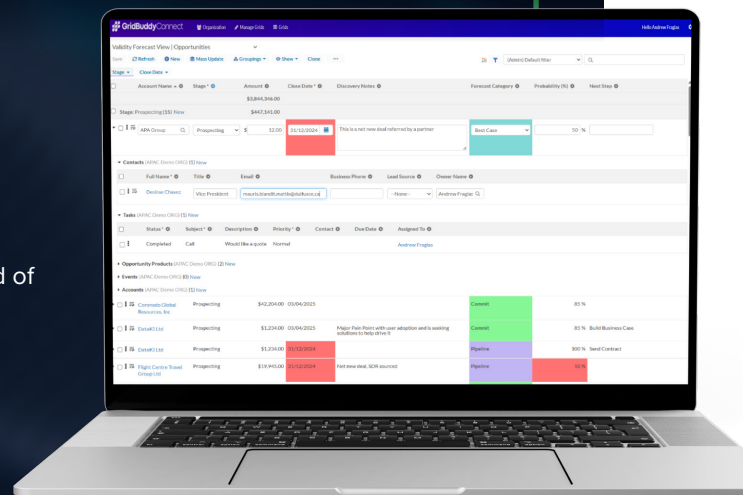
However, the biggest game-changer for the team pertained to prospecting. With custom account-based grids, Colin and the team no longer had to waste time manually piecing together contact histories and previous engagements. Everything they needed was in front of them, allowing them to identify high-value prospects faster and move deals forward with confidence.

> "At Validity, we're committed to equipping our teams with the best tools to drive efficiency and performance. GridBuddy Connect has completely transformed the way our sales teams work in Salesforce—eliminating time-consuming manual processes, improving visibility, and empowering them to focus on what really matters: selling and supporting our customers. The results speak for themselves—faster workflows, better insights, and more impactful customer engagements."
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> **Karen Friedrich | SVP, Global Sales and Channels**

On the service side, Aja's team finally had a customized, centralized workspace built specifically for their needs. Instead of bouncing between multiple screens, they had tabbed views with everything in one place—accounts, cases, renewal data, and past interactions. When responding to customer inquiries, she could instantly reference relevant case details and internal notes, ensuring a faster and more personalized response for customers.

For the first time, Aja and her leadership team now have real-time visibility into customer risk, allowing the business to proactively engage with accounts before problems escalate. She can also bulk-update cases in seconds, eliminating tedious administrative work and freeing up time to focus more on solving customer issues. With conditional formatting highlighting priority cases, her team no longer has to dig through endless records to find what matters most.

The results: Hours of work saved each week, improved forecasting, and more personalized customer engagements.

The impact of GridBuddy Connect was immediate across both sales and customer success teams:

- Sales reps cut down hours of manual pipeline management and the time needed to identify a solid prospect, allowing them to spend more time selling.

- Account management and customer success leadership gained real-time risk visibility, enabling proactive account management.

- Administrative work was drastically reduced, improving efficiency across the business.

- Both teams now operate from a single source of truth, ensuring consistency in sales and service.

With GridBuddy Connect, Validity's teams are no longer reacting to inefficiencies—they're acting with confidence, making smarter decisions, and delivering better customer experiences.

> "GridBuddy Connect has been a big win for our team—what used to take five to seven steps across multiple spreadsheets now happens in one centralized view. It saves us time, ensures everyone is working with real-time data, and makes customer insights more accessible across teams. Instead of digging through outdated reports, we can focus on proactive account management and risk mitigation with confidence."
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> **Barbara Cooke | SVP, Customer Success at Validity**