



It's easy [for sales managers] at a glance to see where their team is at, where they need to focus in their one-on-ones. It's easier to hold [reps] accountable...so it just makes the conversation easier.

Boomer StocktonVP Sales Operations,
Snap Finance

The Challenge:

- · The organization needed a coaching platform, something to help with training and developing leaders
- Didn't know if required 1-on-1 coaching sessions each week were happening, had no visibility into written notes or files saved on a desktop.
- Plagued as a company by many siloed systems, having to log into one and then the other and switch back and forth in the field on a phone or iPad
- Using Salesforce dashboards and reports to help leaders measure activities and results they were trying to achieve was ineffective

Why LevelEleven?

- · It gave them a visual way to understand and measure coaching and performance
- · They needed 'beautiful' data that was easy to digest and consume
- · Native to Salesforce, which was non-negotiable
- It was a 'one-stop-shop' or 'single source of truth' for their sales performance management

The Results

- Everyone is aligned on what the expectations are, so it streamlined their process and created focus and efficiency
- ✓ Newfound ability to track coaching efforts and document sessions that isn't on paper, but stored in one easy to access location that managers and executives can access
- ✓ Achieved gamification of their sales process to tremendous success, because reps found it fun and exciting to compete amongst their teams
- ✓ Helped them use the data they were already capturing in Salesforce to drive the outcomes they hoped to achieve
- Most important to them was accountability; LevelEleven gave visibility into the efforts of managers and reps and helped pinpoint areas with opportunities for improvement