

cfMAX real-time customer action recommendations for the sales force:



Typical Users

- B2B
- Fast transaction, shorter sales cycle
- Multi-channel sales: field, inside, call centers, partners
- Multiple product lines
- Minimum several dozen sales reps
- Minimum 1 year of sales data

If your sales environment does not fit this exactly, contact our team to explore how we can apply our methods to meet your needs.

Convert Leads

An \$8 billion retailer wanted to better target customers who had placed one or two orders, and encourage multiple purchases for the small and medium business segment. Several models were developed to identify customers with the most future potential. Targeted outbound calling was initiated to customers who had not placed subsequent orders within the crucial expected time period.

Result: Incremental sales, average order size, first-time buyer conversion and quotes generation were all substantially higher for the “pilot sales reps” than the “control group” that conducted business as usual.

Retain Customers

A Fortune 500 B2B retailer rolled out the timing model across seven business segments and 2,000 account managers over a four-year period as part of its internal CRM system.

Result: Incremental sales of \$120M were generated during a phased rollout, with \$150M projected annually. This represented an approximate 15% incremental sales increase from a highly vulnerable customer base that was in danger of being lost.

Nurture Accounts

A Fortune 500 Key Accounts program needed to achieve significant sales increase and move “next tier” accounts into the program. But they did not know how these customers were buying across the entire product set, drivers of growth or what investment was made or required of sales resources.

Our models identified customers with greatest growth potential, expected mix of products and services, and resources to maintain above-average growth and achieve sales targets.

Result: Double-digit incremental revenue gain over the next 12 months from customers who were already in the top 15% of revenue the prior year.

How will our solutions work for you? Contact:

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We make CRM smarter:

“It’s amazing how accurate the predictions are. It gives us a lot of confidence to approach customers and be proactive – that’s dollars begging to be taken.”

- Director of Sales, Advanced Technologies Group, Fortune 500

CASE STUDY RESULTS

Predictive analytics tools for sales.
Designed with salespeople,
for salespeople.

sfMAX proactive planning action recommendations for sales managers:



Balance Accounts

A major retailer traditionally created a book for new reps through a mix of prospects, inactive customers and “leftovers” from other account reps. Sales management wanted to test a different approach to bring better success to new reps. Distinct factors were identified and modeled to assess predicted future value, and actions were recommended to improve the rules.

Result: Reps that obtained a more balanced portfolio due to the revised rules recorded higher sales growth than the previous legacy-based allocation method.



Manage Transitions

A 2K-strong sales force retailer was transitioning accounts “after the fact,” determining where the account should go based on a new rep’s past performance, not with expected load of new assignments. About half of the accounts declined during the transition delay. The solution identified future growth, created a scoring system based on new workload scenarios, and paired customers with reps who could likely grow the accounts.

Result: When reassigning according to *sfmove* models, one-year gains of +35% were achieved versus -10% loss for “status quo” assignments.



Provide Coverage

A technology retailer invested in field, specialist and partner campaigns without a view into which customers were most likely to respond. By standardizing customer revenue against tiers of coverage, incremental benchmarks were established and incorporated into investment decisions.

Result: Due to well-aligned targeting, partner marketing funding and close ratio for advanced technology services increased by over 15%.

Sales Managers Say:

“This stuff works. Once you get a taste for how predictive analytics makes your life easier and delivers results, you’ll never be without it!”

- Sales Manager, \$1 Billion Small Business Division of High Tech Retailer

Learn more at
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Valgen’s Vision:

We want to make life easier for more sales professionals, and bring real results to you.

