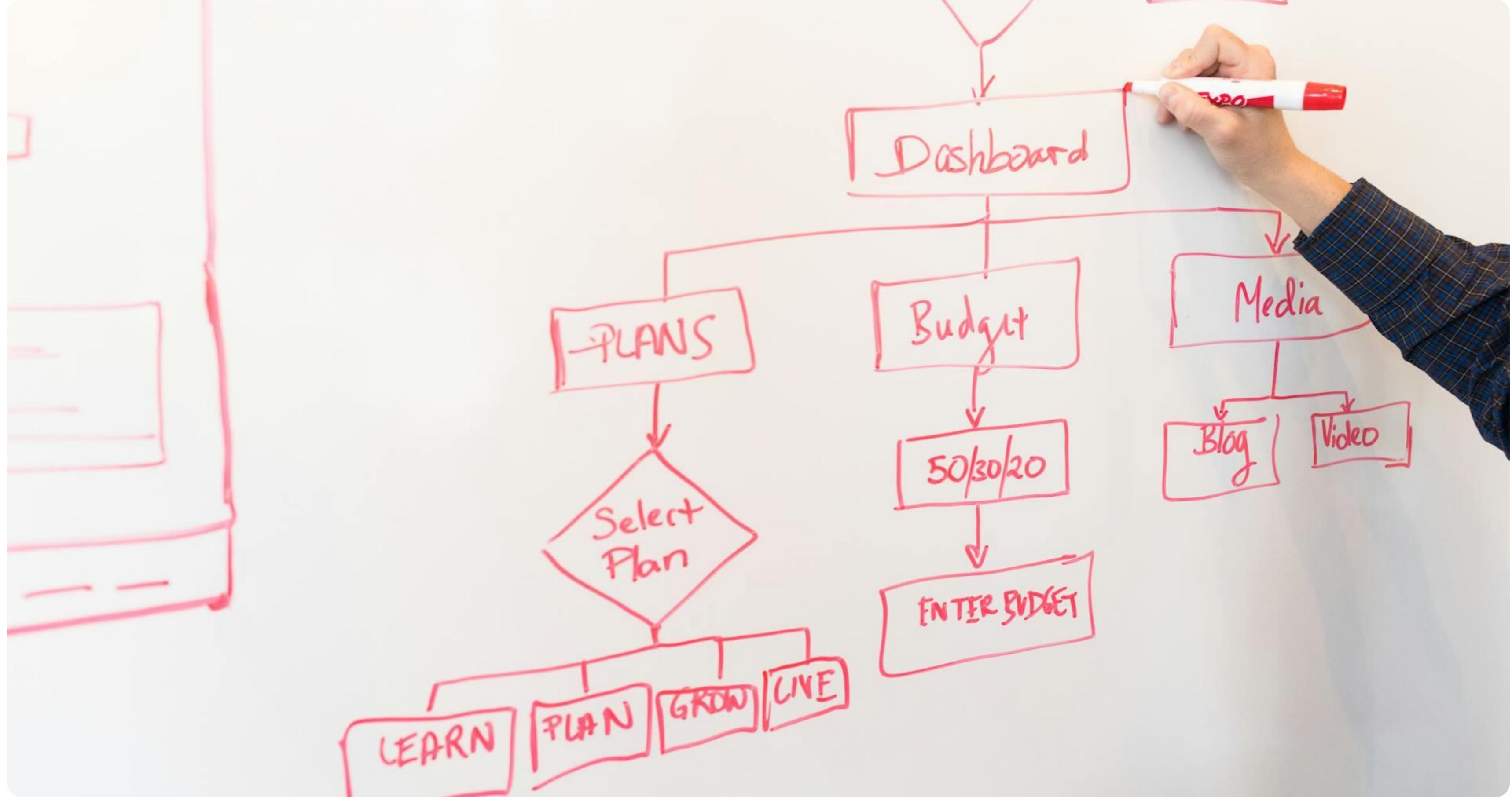


# Asana Case Study: Recalibration of the Trial Pipeline



## Company Overview

Asana, a leading provider of project management software, undertook a significant project to recalibrate its trial pipeline, which had experienced a dip in revenue. This case study explores the detailed process that Asana followed to understand the issue, redesign the trial pipeline, and ultimately improve their conversion rates and sales efficiency.

## Services we provided

Salesforce Hubspot Marketo

## Problem Statement

Asana's trial sign-up flow was one of the company's largest sources of revenue, comprising sign-ups for demos, website trials, or in-app trials. These leads entered the CRM as opportunities, later worked on by the sales team to convert into revenue-generating opportunities. The observed dip in the trial pipeline's effectiveness triggered an in-depth analysis and recalibration project.

The trial pipeline is critical to Asana's business, driving significant opportunities. However, the lack of a streamlined process led to inefficiencies and reduced effectiveness. Asana required a system that could:

- **Understand Data Flow:** Analyze how leads were carried through various systems and how data was stored, transferred, and changed.
- **Identify Pipeline Flaws:** Determine where automated steps weren't happening correctly or where the flow was breaking down.
- **Correct Process Flows:** Address issues in the trial pipeline that affected sales operations and marketing sequences.

The primary challenge was that Asana did not have a properly documented structured workflow for the trial pipeline. This lack of documentation, combined with personnel changes, led to inconsistencies in the trial pipeline process.

## Solution

Asana undertook a comprehensive recalibration of the trial pipeline, focusing on these key areas:

### Discovery Phase

- **System Analysis and Mapping:** The initial step involved a system analysis to map out the entire process flow, from trial sign-ups to sales opportunities. The team examined each system and stack tool in isolation to understand their automated steps.
- **ETL Diagram:** Created an ETL (Extract, Transform, Load) diagram to illustrate the data flow within the trial pipeline.
- **Identifying Bottlenecks:** The discovery phase revealed several issues, including tools that weren't being used, broken sales process automations, and missing opportunities. Additionally, certain marketing and sales sequences had flaws, routing data to incorrect places.

### Redesigning the Workflow

- **Stakeholder Discussions:** Asana held extensive discussions with marketing operations and revenue operations teams to determine whether to retain the legacy workflow or design a new one.
- **New Workflow Design:** A revised version of the trial pipeline was created, with specific fixes for the data flow diagram, ensuring a streamlined process from sign-up to sales conversion.
- **Centralized Data Source:** Asana decided to use Salesforce as the primary source of truth, integrating data from other platforms like Outreach and Marketo into a single operational system.
- **Data Visualization Setup:** Developed a data visualization dashboard to monitor the trial pipeline for bottlenecks and other issues. The dashboard combined data from over 74 different tables into one holistic view, providing history, tracking, and snapshot data.

## Result

The recalibration of Asana's trial pipeline yielded significant results:

- **Increased Opportunity Pipeline:** Asana increased the opportunity pipeline for the trial sign-up side by 11% in the following quarter, recovering from the prior dip in pipeline.
- **Higher Revenue:** The recalibration project pushed revenue above the previous levels by 1.7%.
- **Reduced Lead Times:** The redesign reduced the lead time from Marketing Qualified Leads (MQL) to Sales Qualified Leads (SQL) and from SQL to opportunity.
- **Enhanced Efficiency:** Streamlined the overall sales process, reducing bottlenecks and improving operational efficiency.

## Conclusion

Asana's successful recalibration of the trial pipeline through a detailed discovery phase and redesigning the workflow showcases the importance of system analysis and stakeholder collaboration. The implementation of a centralized source of truth and a comprehensive data visualization setup allowed Asana to monitor and optimize the trial pipeline effectively. The resulting increase in the opportunity pipeline, higher revenue, and reduced lead times demonstrated the effectiveness of Asana's recalibration strategy, providing a blueprint for similar projects in the future.