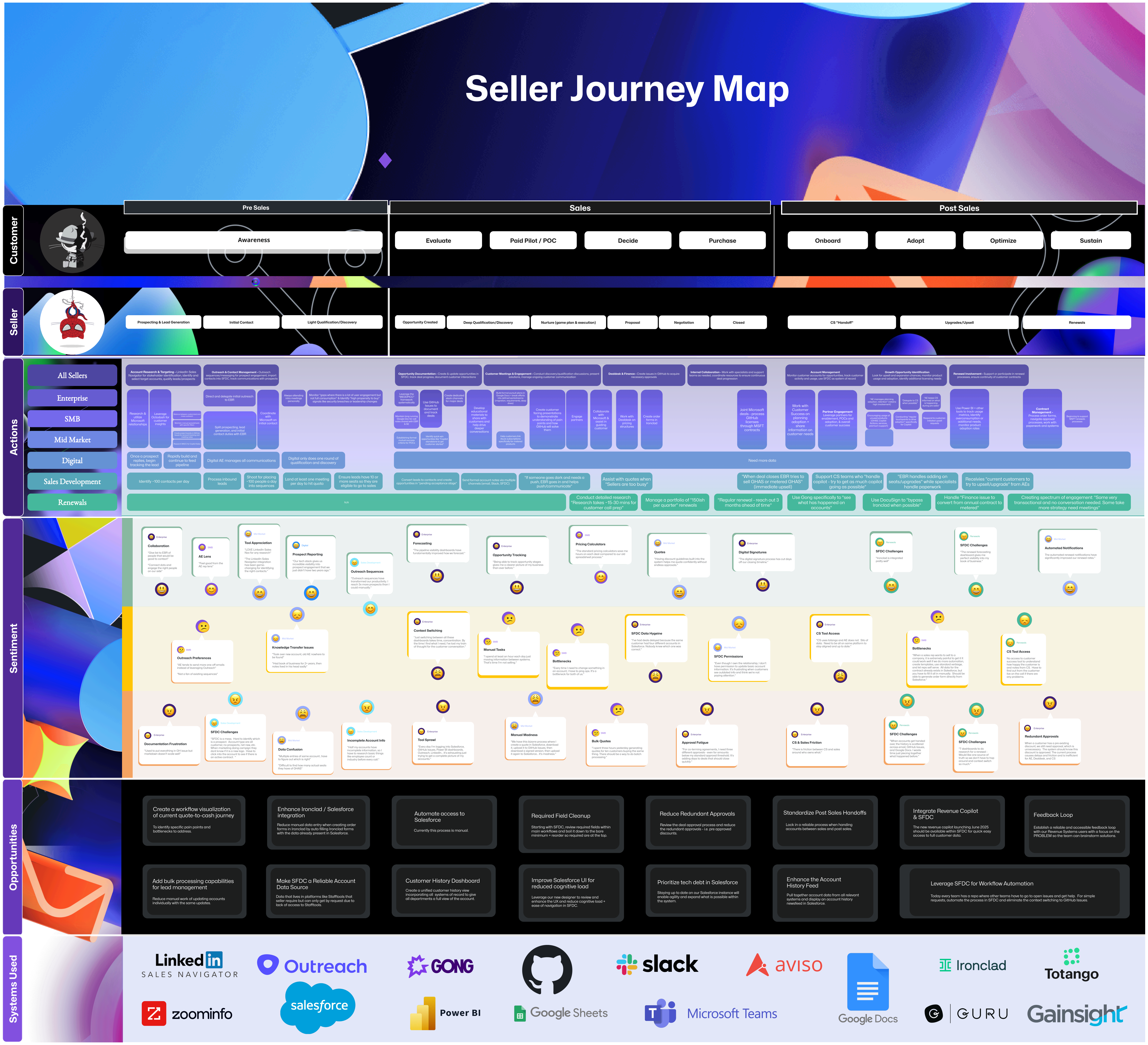

Seller Journey Map
Customer
Pre Sales
Sales
Post Sales
Awareness
Evaluate
Paid Pilot / POC
Decide
Purchase
Onboard
Adopt
Optimize
Sustain
Seller
Prospecting & Lead Generation
Initial Contact
Light Qualification/Discovery
Opportunity Created
Deep Qualification/Discovery
Nurture (game plan & execution)
Proposal
Negotiation
Closed
CS "Handoff"
Upgrades/Upsell
Renewals
Actions
All Sellers
Enterprise
SMB
Mid Market
Digital
Sales Development
Renewals
Sentiment
Enterprise
Documentation Frustration
"Used to put everything in GH issue but markdown doesn't scale well"
Sales Development
SFDC Challenges
"SFDC is a mess. Hard to identify which is a prospect. Account type are all customer, no prospects, not new, etc. When marketing doing campign they dont know if it is a new logo. Have to click into the account to see if there is an active contract. "
Mid Market
Data Confusion
"Multiple entries of same account...have to figure out which is right"
"Difficult to find how many actual seats they have of GHAS"
Sales Development
Incomplete Account Info
"Half my accounts have incomplete information, so I have to research basic things like employee count or industry before every call."
Enterprise
Tool Sprawl
"Every day I'm logging into Salesforce, GitHub Issues, Power BI dashboards, Outreach, LinkedIn... it's exhausting just trying to get a complete picture of my accounts."
Mid Market
Manual Madness
"We have this bizarre process where I create a quote in Salesforce, download it, upload it to GitHub Issues, then download a signed version, then upload it again to Salesforce... it's madness."
SMB
Bulk Quotes
"I spent three hours yesterday generating quotes for ten customers buying the same thing. There should be a way to do batch processing."
Enterprise
Approval Fatigue
"For co-terming agreements, I need three different approvals - even for amounts below my standard approval threshold. It's adding days to deals that should close quickly."
Enterprise
CS & Sales Friction
"There is friction between CS and sales around who owns what."
Renewals
SFDC Challenges
"When accounts get handed over, the history is scattered across email, GitHub Issues, and Google Docs. I waste time just piecing together what happened before."
Renewals
SFDC Challenges
"7 dashboards to do research for a renewal - Would like one source of truth so we don't have to hop around and context switch so much."
Enterprise
Redundant Approvals
When a customer has a pre existing discount, we still need approval, which is unnecessary. The system should know this discount is approved. The current process causes delays and friction and is inefficient for AE, Dealdesk, and CS
Opportunities
Create a workflow visualization of current quote-to-cash journey
To identify specific pain points and bottlenecks to address.
Enhance Ironclad / Salesforce integration
Reduce manual data entry when creating order forms in Ironclad by auto filling Ironclad forms with the data already present in Salesforce.
Automate access to Salesforce
Currently this process is manual.
Required Field Cleanup
Starting with SFDC, review required fields within main workflows and boil it down to the bare minimum + reorder so required are at the top.
Reduce Redundant Approvals
Review the deal approval process and reduce the redundant approvals - i.e. pre approved discounts.
Standardize Post Sales Handoffs
Lock in a reliable process when handing accounts between sales and post sales.
Integrate Revenue Copilot & SFDC
The new revenue copilot launching June 2025 should be available within SFDC for quick easy access to full customer data.
Feedback Loop
Establish a reliable and accessible feedback loop with our Revenue Systems users with a focus on the PROBLEM so the team can brainstorm solutions.
Add bulk processing capabilities for lead management
Reduce manual work of updating accounts individually with the same updates.
Make SFDC a Reliable Account Data Source
Data that lives in platforms like Stafftools that seller require but can only get by request due to lack of access to Stafftools.
Customer History Dashboard
Create a unified customer history view incorporating all systems of record to give all departments a full view of the account.
Improve Salesforce UI for reduced cognitive load
Leverage our new designer to review and enhance the UX and reduce cognitive load + ease of navigation in SFDC.
Prioritize tech debt in Salesforce
Staying up to date on our Salesforce instance will enable agility and expand what is possible within the system.
Enhance the Account History Feed
Pull together account data from all relevant systems and display an account history newsfeed in Salesforce.
Leverage SFDC for Workflow Automation
Today every team has a repo where other teams have to go to open issues and get help. For simple requests, automate the process in SFDC and eliminate the context switching to GitHub Issues.
Systems Used
LinkedIn SALES NAVIGATOR
Outreach
GONG
slack
aviso
Ironclad
Totango
zoominfo
salesforce
Power BI
Google Sheets
Microsoft Teams
Google Docs
GURU
Gainsight