



Salesloft.

# OneDigital | Salesloft

## The Salesloft Revenue Nucleus

2026 Revenue Orchestration Initiative

OneDigital + Salesloft | August 2025



Through its convergence strategy, OneDigital has assembled traditionally-siloed employee benefits under a single provider, offering holistic customer value and a lasting competitive advantage



## Why pursue a strategy of convergence:

Offer superior customer value



Unlock cross-selling revenue streams



Offer holistic solutions to customers



Mike Sullivan, Co-Founder & Chief Growth Officer

In a space where acquisitions are such a significant part of our ability to diversify and scale, our crystal-clear vision is what keeps us looking beyond the bottom line at what really matters: how does this specific firm help round out our integrated solution set for clients and support the build in a geography that needs it?

while the first half was about laying the foundation and identifying the best path forward, the second half is about finding the right teams, tying everything together, and building an integrated, disruptive offering.

Transformation strategies, particularly those involving product line expansion and M&A activity, risk missing out on their potential if the tech stack doesn't evolve

- Complex tech stacks
  - Inefficient workflows
  - Inconsistent processes
  - Management visibility limitations



In order to capture the value of convergence and achieve the targeted 20% improvement to sales effectiveness, OneDigital needs a **revenue nucleus** to drive similar convergence in tech

THE  
GOAL:

### Offer superior customer value

THE ISSUE:

- Despite a strong internal culture, OneDigital faces a "customer perception gap," with lower scores in customer service compared to its competitors

THE  
CAUSE:

- Inconsistent customer lifecycle management processes
- Lack of visibility into client engagement or risk

### Unlock cross-selling revenue streams

- Cross-selling across OneDigital's widening solution set is slower than it could be

### Offer holistic solutions to customers

- A large portion of new customer acquisitions are still limited to a narrow product set

THE  
RESULT:

REVENUE RETENTION 

CUSTOMER GROWTH 

AVERAGE DEAL SIZE 

# Salesloft will act as OneDigital's revenue nucleus, providing process support, informing GTM insight, and activating buyer intelligence

Week 1 - 4



Phase 1  
Capacity and consistency

- Unify GTM tools under a system of action
- Remove manual burdens to improve productive capacity
- Structure consistent and measurable account engagement frameworks
- Enhance Leadership's insight into seller and GTM performance

- Automation
- Cadences
- Agentic prospecting
- Coaching & Analytics

↑ Customer lifecycle consistency

↑ Customer proactivity

↑ Selling process consistency

Month 2 - 6



Phase 2  
Insight and collaboration

- Refine account engagement frameworks for further effectiveness
- Analyze the voice of the customer for collaboration and coaching
- Access detailed account histories across selling teams for improved collaboration

- Coaching & Analytics
- Conversation intelligence
- AI-activated account histories

↑ Voice of the customer insights

↑ Cross-sell visibility

↑ Best practices & coaching

Month 6+



Phase 3  
Prioritization and upskilling

- Prioritize seller workflows based on signals from the tech stack
- Provide buyers with tailored web experiences that drive engagement
- Incorporate custom data signals into intelligent, prioritized workflows

- Rhythm
- Drift

↑ Customer risk prevention

↑ Cross-sell prioritization

↑ Pipeline growth and progression

By implementing Salesloft, OneDigital will achieve the necessary 20% improvement to sales effectiveness, improving revenue retention, growing accounts, and selling larger deals

THE  
GOAL:

**Offer superior customer value**

THE  
SOLUTION:

- Maximize the advantages of a class-leading portfolio by pairing with exemplary customer service

**Unlock cross-selling revenue streams**

THE  
DRIVER:

- Consistent, proactive customer lifecycle management
- Full visibility and activation of customer engagement and risk signals

**Offer holistic solutions to customers**

THE  
RESULT:

REVENUE RETENTION ↑

CUSTOMER GROWTH ↑

AVERAGE DEAL SIZE ↑

- Accelerate cross-selling and account growth

- Upskill the selling force to sell larger, stickier, more strategic deals

- Proactive customer management processes
- Full visibility and improved collaboration across selling teams
- Lead persistence for pipeline maximization

- Improved identification of and coaching on best practices, shifting the culture to selling more products through consultative, strategic cycles
- Process consistency and lack detailed GTM measurability