

Cloud & Data Services Company

At a glance

A \$250M data and cloud services firm, with 1,500 employees, needed a way to structure their Account Planning process and align with customer goals and objectives.

Key metrics



35%

faster response to opportunity trigger events.



27%

increase in pipeline opportunities linked to key offerings.



20%

higher conversion from opportunity to qualified pipeline.

CHALLENGES



- Late entry: Reps often discovered cloud/data initiatives after vendors were already shortlisted.
- Missed white-space: Lack of visibility into signals indicating new growth opportunities
- Inconsistent plans: Sales strategies varied across accounts, impacting scalability and effectiveness.

SOLUTIONS



The company turned to Account Growth to bring structure and discipline to its account planning process. Instead of scattered, inconsistent plans, sales teams adopted a standardized framework with clear roadmaps, mapped stakeholders, and actionable steps. This structure was powered by key enablers: intent signals that revealed customer initiatives early, whitespace analysis that exposed untapped growth areas, and goals and objectives alignment that ensured every plan tied directly to customer business priorities. Together, these capabilities transformed account planning from a static exercise into a dynamic, data-driven process that scaled across accounts and deepened customer engagement.

BENEFITS



Influence

1

Sales reps engaged buyers at the right moment, improving influence.

Strategic Conversations

2

Conversations became more strategic, increasing trust with decision makers/influencers.

Expansion

3

Coverage expanded across multiple offerings leading to more anchors into customer engagements.

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