

Salesforce Optimized for Lead Qualification & Sales



Industry



AI solutions for large e-commerce Orgs. Lily AI is the customer intent platform built to power the present & future of e-commerce

THE PROBLEM

Lily.ai was using an instance of Salesforce that was virtually “out-of-the-box” with little to no optimization for Lily.ai’s specific business needs. Functionality was missing, there was too many staff using Salesforce, and detailed analytics and reporting were at a bare minimum. They needed the tool tailored for their use cases and assistance with the change management roadmap that got them to a state where day-to-day operations ran smoothly.

OUR SOLUTION

Now, Lily.ai has a smaller user team on Salesforce, more defined roles for staff, and more automated processes to keep business operations in check. The tool has been optimized to follow the *BANT methodology of lead qualification*, and the *Meddic methodology for sales* - two of the most trusted approaches for large and elite sales teams. Their Salesforce instance has also been built to scale with staff as the business grows, setting them up for immediate and long-term success.

IMPROVED RESULTS

Lily.ai can now track opportunities and prospects as they progress through acquisition and deal stages, supported by automated alerts and reports to help reach sales targets

- The entire customer acquisition to conversion journey has been mapped and automated to keep sales staff on track
- Weighted forecasting allows Lily.ai to determine which prospects are high-value vs. low-value
- Detailed escalation and automation rules keep non-responsive prospects in communication until they engage, increasing leads while reducing staff work
- Automated alerts and reports keep staff engaged with prospects who are taking actions and are more likely to become a conversion



Customer Quote

“The goal here at Lily.ai is to build a data-driven and data-centric org with Salesforce being at the foundation of that philosophy. I knew I couldn't build it by myself. I needed the skills and muscle of StarrData.

StarrData has such a tremendous knowledge base for customer solutions - if they don't have an answer they get one and offer options with pros and cons. I know they'll approach things the right way. I never have to worry about negative impacts and there are no surprises in change management.

StarrData has a really good team. They have been trusted partners throughout the entire process.”



John Aguilar - Director of Sales Operations at [Lily.ai](https://www.lily.ai)



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