![Procurify logo] Procurify

PRECURSIVE CASE STUDY.
CUSTOMER - PROCURIFY
SPEND MANAGEMENT SOFTWARE

PRECURSIVE

PLAN. TRACK. FORECAST.

CUSTOMER: **PROCURIFY.**

IMPROVING TIME TO VALUE THROUGH BETTER CUSTOMER ONBOARDING

Procurify's spend management software helps organizations control spending. Our improved procurement and purchasing workflows track purchases, set-up fast digital approvals, and manage all the steps of the procure-to-pay process.

www.procurify.com

"More than ever, people need to generate an income from their investment in a very few days. Projects cannot go on and on. There is a direct correlation between the onboarding time and the levels of churn, so the time between purchasing a solution and getting value is essential."

JULIAN HANNABUSS.
Director of Revenue Operations
PROCURIFY

PRECURSIVE

HOW PROCURIFY **USES PRECURSIVE.**
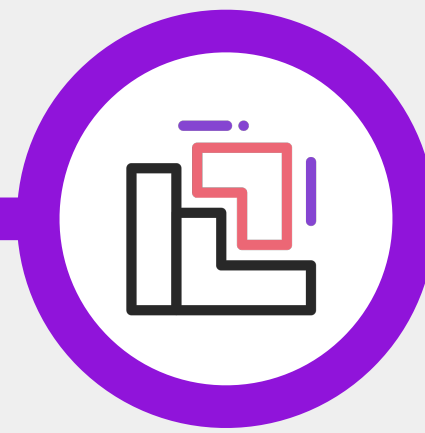
1. Opportunities in Salesforce
Better capture and visibility of leads with quoting managed in Salesforce CRM.

2. Capacity Management
More balanced workload across people, level and accounts

3. Reporting
Advanced reporting and predictive analysis of churn risks along with Salesforce and Gainsight data

4. Mobile App
Staff know their schedule and book time on any device, from anywhere

5. Alignment
Productivity increased by aligning sales & delivery teams

Key point: "Precursive provides us a dashboard view of past, current, and future resourcing across people, projects, and accounts."

PRE**CURSIVE**

CUSTOMER **CHALLENGE.**

Procurify wanted to improve time to value by improving the efficiency of customer onboarding processes and in turn improve customer retention by reducing their year one customer churn rate. There was no consistent approach to customer onboarding and a lack of technology to support this key process. The result was slower implementations leading to higher churn risk for customers.

Further to this, maintaining company culture and employee engagement, would help them to thrive in a remote working environment whilst they could also maximize customer potential by ensuring that they were delivering an expansion strategy on existing customer accounts.

THE **SOLUTION.**

salesforce — The World's #1 CRM

PRECURSIVE — The Services Delivery Cloud for Salesforce

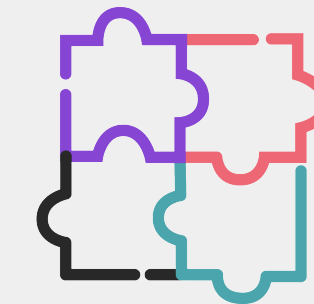**Opportunity Management**

Quoting

Business intelligence aggregation
Manage & forecast opportunities
Sales of products and packages

Customer Onboarding

Playbooks

Capacity Management

Project Management

Templated onboarding plans
Task assignment & tracking delays
Project & Capacity Management

THE **SOLUTION.**

The Procurify team were already working on cloud-based systems, however, by intelligent usage of customer interaction data in conjunction with remote project management technology, the team were able to go even further in optimizing their onboarding and professional services project management through to delivery.
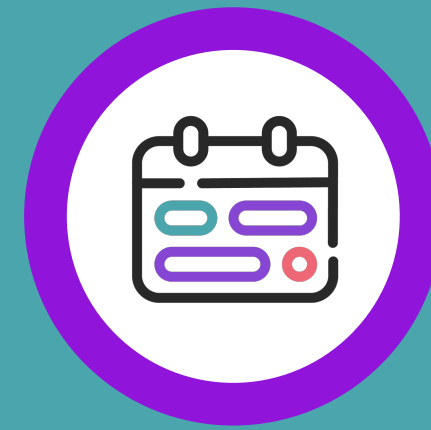

Sales → **Delivery** → **Customer Success**

PRECURSIVE **SOLUTION.**

FASTER.
Time to Value

Average time to onboard is 45% quicker with intelligent use of customer interaction data.

IMPROVED.
New Playbooks

Introduced templates for different types of implementations to reduce churn risk.

INCREASED.
NPS

Higher NPS scores during onboarding process by managing and sharing plans with the customer.

EMPOWERING SERVICES **TEAMS.**

CUSTOMER SUCCESS.

ENABLING
OUTCOMES

Precursive team with
enterprise experience at
ABB, Fujitsu, Roche

LIGHTNING NATIVE.

TECHNICAL
INNOVATION

> $1 Billion in project
value managed in
Precursive

ENTERPRISE SECURITY.

TRUST &
PRIVACY

GDPR compliant
ISO 27001:
2013 certified

PRE**CURSIVE**

★★★★★ 5.0
Average Rating

PRECURSIVE **CUSTOMERS.**

High Tech.

Google | MHR | ALLOY | BetterCloud | GONG

Profesional Services.

Challenger | torrent CONSULTING | Talentful | JACK MORTON | cts

PRECURSIVE