

patsnap

PRECURSIVE CASE STUDY.

CUSTOMER - PATSNAP

INNOVATION INTELLIGENCE PLATFORM

PRECURSIVE

PLAN. TRACK. FORECAST.



CUSTOMER: **PATSNAP.**

Patsnap is the company behind the world's leading innovation intelligence platform. PatSnap's connected innovation intelligence platform brings together millions of R&D and IP datasets to allow their customers to connect the dots, increase productivity and innovate more effectively. PatSnap helps more than 8,000 customers in 40+ different countries make better innovations decisions every day. Customers are innovators across multiple industry sectors, including agriculture and chemicals, consumer goods, food and beverage, life sciences, automotive, oil and gas, professional services, aviation and aerospace, and education.

<https://www.patsnap.com/>

"As we scaled we knew we needed to track certain metrics. With Precursive OBX we were able to get ahead of capacity and resource requirements before they ever became unmanageable. Precursive OBX would benefit the large majority of SaaS businesses once they have the ability to focus and invest time into their implementation process."

EMILY KUSKE.

Customer Success Leader
PATSNAP

HOW PATSNAP **USES PRECURSIVE.**



1.

Capacity Planner

Ensures that time available is fully utilized by teams for maximum efficiency.



2.

Financial Forecasting

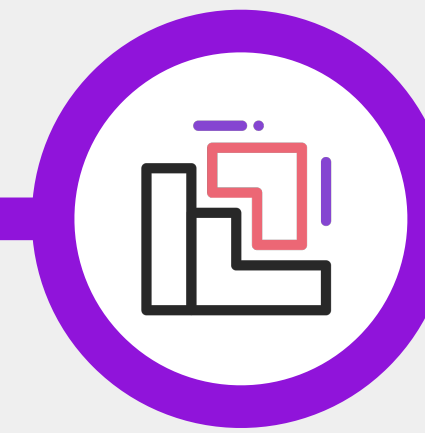
Revenue forecasts calculated automatically to see where you are.



3.

Customer Onboarding

Create a scalable and repeatable process by analyzing what works best and save significant time.



4.

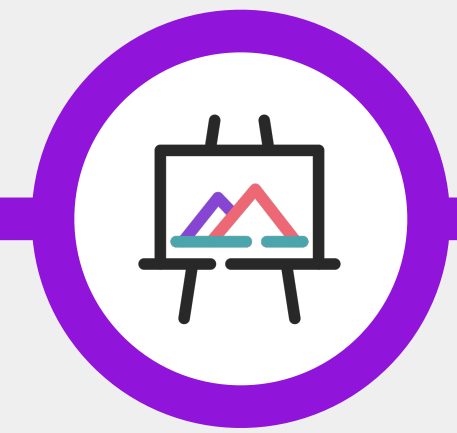
Task Allocation

Break down a project or process and assign tasks to teams to maximize productivity.

5.

Project Management

Enhanced visibility and reporting across all projects in Precursive.



Key point: “With Precursive we were able to get ahead of capacity and resource requirements before they ever became unmanageable.”

CUSTOMER **CHALLENGE.**

PatSnap wanted to ensure better collaboration both internally and externally.

- **Global scaling:** The team needed to structure the way they were managing their global implementation to ensure consistency.
- **Improved visibility:** Better tracking and reporting on time and resources.
- **Full integration:** PatSnap wanted to manage all stages of their customer journey on one platform, Salesforce.



THE SOLUTION.



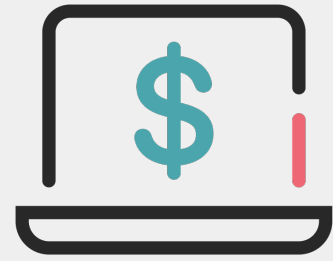
The World's
#1 CRM

PRECURSIVE

The Services Delivery
Cloud for Salesforce



Opportunity
Management

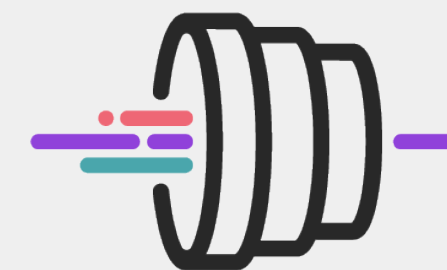


Quote
Generation

Business intelligence aggregation
Manage & forecast opportunities
Sale of products & packages



Capacity
Management



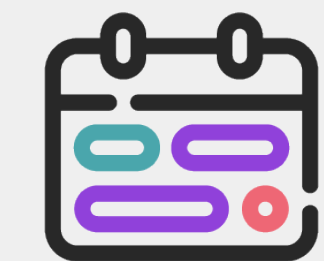
Project
Management

Project & Capacity management
Progress & task completion monitored
Forecast capacity crunches



Onboarding
Playbooks

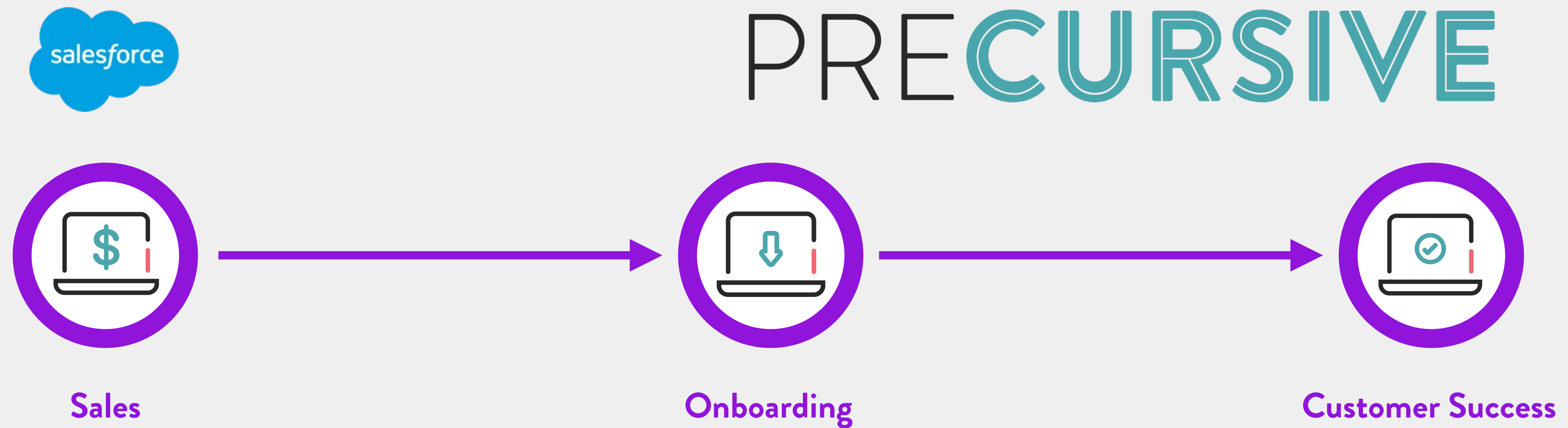
Benchmarking TTV and progress
Managing onboarding process
Templated onboarding plans



Customer
Onboarding

THE SOLUTION.

Patsnap have been using Precursive for over 5 years to help define their customer journey from inception in Salesforce through practiced playbooks for onboarding and into perfected customer experience.



PRECURSIVE **SOLUTION.**



TIME.

To value

With Precursive, Patsnap's time to value has significantly improves across all products and verticals.



25% GROWTH.

Increase

Efficiency gains with teams able to consistently onboard customers quickly with minimal admin.



30% CAPACITY.

Increase

Patsnap saw a sharp upturn in capacity per person made possible by adoption of the Precursive tool.

EMPOWERING SERVICES **TEAMS.**

Highest User Adoption
Mid-Market
SPRING 2023

Highest User Adoption
Mid-Market
WINTER 2023

Highest User Adoption
Mid-Market
WINTER 2023

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

Highest User Adoption
Mid-Market
SUMMER 2022

Highest User Adoption
Mid-Market
FALL 2022

Highest User Adoption
Mid-Market
FALL 2022



PRECURSIVE **CUSTOMER SNAPSHOT.**

High Tech.



Professional Services.



PRECURSIVE

PRECURSIVE

THE SERVICES DELIVERY CLOUD FOR SALESFORCE

PLAN. TRACK. FORECAST.

www.precursive.com