Intuit transforms its sales process in 8 weeks using Skuid.

“Without Skuid, we wouldn’t have been able to do all of that work in the same time frame.”

— Amanda Joslin, Group Product Manager, Intuit

Overview

Intuit creates business and financial management solutions for small businesses, consumers, and accounting professionals. They’re the force behind household names like Mint, TurboTax, and QuickBooks. As a 33-year-old company, they are constantly transforming. When the company made a major decision to transition from a “box software” company to a cloud-based subscription model, Skuid became part of that journey.

Challenge

Intuit needed an entirely new sales process to equip their 1,600 sales reps to sell their new subscription model and make more deals, faster. Before the transition, the sales reps used three separate tools in their sales process—CS Server, a custom built tool referred to as “Sales Tool,” and a customized database app built with Quickbase. The result was a disparate workflow with data siloed in three different places and time wasted waiting for data to be transferred between systems. Because it was so cumbersome to have multiple tools, Intuit struggled to get their reps to use them at all.

In addition, the sales reps couldn’t sell their product directly. They had to direct their customers to a website or another tool to purchase the product. This meant fewer deals and a slower, disjointed sales process. The average sales cycle with a new customer took about 20 minutes and 50 clicks.

Intuit knew how they needed their new business process to work, but other tools didn’t fit their unique needs for various reasons. Other solutions required a lot of coding for customization and didn’t have the ability to make the quick changes they needed to adapt to user feedback. Most other options also had a time-to-market length that would not fit Intuit’s strict deadline.

Solution

Skuid was the best solution for Intuit, addressing their data silo, workflow and sales productivity challenges. In an eight week period and with a team of four
developers, Intuit built several work systems that enabled their sales agents to sell the company’s major subscription product. They built one application to manage online sales, 360° customer view, and business development.

Unlike their old system, reps can now use the online sales tool to sell Quickbooks Online and Payroll from a single unified experience. With Skuid, they created this entire workflow, building a CPQ-like process that includes a commissions tracker for all of their sales agents. Sales reps can easily use data to drive their business.

Intuit also built a 360° customer view page and a business development dashboard that allow reps and managers to pull in data from different tools and objects with the click of a button. With this functionality, Intuit’s reps now have full visibility into their accounts, and managers can quickly identify opportunities and check the status of deals. This new system allows each user to have a customized view based on their specific needs.

**Results**

The new application generated an immediate ROI, saving Intuit hundreds of thousands of dollars a year in technology costs and increased sales productivity.

The new process built with Skuid takes nine clicks and less than five minutes to complete a sale. Previously the process took at least 20 minutes and more than 50 clicks. Sales reps estimate being up to 79% more productive in their daily processes with Skuid, and they’ve observed more than a 90% improvement in their KPIs since switching to Skuid.

Intuit estimates that with their old system built in Visualforce, this workflow would’ve taken at least four months to build, plus more human resources, and thousands of lines of code.

Since switching to Skuid, Intuit estimates that user adoption from their sales reps has improved up to 80%. This is due to both the drastically-improved user interface of the new system, and the ability to quickly respond to requests from users. Intuit’s team is now able to listen to the needs of their sales reps and deliver those changes immediately, as opposed to the months it took to make those changes with custom code.

“The workflow enabled by Skuid is just very simple, so we haven’t needed much training,” says Amanda Joslin, group product manager at Intuit. “All three projects were truly amazing, what we were able to put out in such a short time. We saved thousands of lines of code. Without Skuid, we wouldn’t have been able to do all of that work in the same time frame.”

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**Case Study**

Amanda Joslin,
Group Product Manager, Intuit