Procore increases sales pipeline production 50%.

> "Now that our organization is utilizing Skuid, I have seen a tremendous uptick in day-to-day production. I save hours with in-line editing, customizable page layouts, and simple data manipulation."
>
> — **Doug McDaniel,** Business Development Representative,Procore

Overview

Because out-of-the-box Salesforce® functions could not meet their exacting needs, Procore assembled a bespoke solution around its proprietary sales process by assembling a completely made-to-order user experience with Skuid. In less than 6 months, the new application increased pipeline production by 50% and increased total call volume by 20%. Procore will also save $648,000 every year by replacing four other SaaS applications with Skuid.

Results

$648k

annual savings by eliminating other apps and tools

20%

total call volume increased

50%

pipeline production increased

Challenge

Procore—a cloud-based software company with a suite of project management tools for construction firms—has their sales process down to a science. There was only one problem—they couldn't find a technology to help implement their findings.

"We didn't want to change the way we work to fit a product. We wanted a product that would work exactly how our people work," says Procore's Director of Sales, Dan Miller-Smith.

"We struggled to get out-of-the-box Salesforce to work for our benefit," says Thomas Woolley, Business Development Manager at Procore. "I constantly felt like things were slipping through the cracks because the information wasn't easy to access."

The BDR team also had trouble with pipeline reporting and forecasting. To fit their unique sales approach, Procore defined pipeline status differently, which would not work in Salesforce's standard pipeline reports, so Dan's assistant spent hours entering Salesforce data into spreadsheets to show an accurate pipeline to their executive team.

Solutions

Dan asked for help from Megan Minihan, a business systems analyst at Procore. Megan tried to find apps to solve Procore's cadence, workflow and reporting problems, but nothing fit. Megan also worried that bolting on more apps

with different interfaces would make the user experience even more confusing for Procore's sales team. When Megan found Skuid's drag-and-drop user experience platform, she knew Procore's business was about to change forever.

Following Dan's lead, Megan began assembling an app with Skuid's code-free tools. Guided by Skuid tutorials, in just two days, Megan launched a custom app for Procore's inside sales team without requesting resources from Procore's busy IT department.

"We know what works for us, and Skuid gives us complete control over the process, instead of making it fit to another product's processes," Dan says. "It's a complete game changer."

Megan implemented Dan's custom cadence and created a dashboard where BDRs could see their daily tasks in one place. Megan also created a page that displays all account information in one place so BDRs can quickly get up to speed about a company before calling them. Dan was sure the tool would supercharge his team's productivity, and he was right.

Results

Dan and Megan rolled out the new user experience to their BDR team, and the response was overwhelmingly positive from both the BDRs and the Procore management team. Dan saw an immediate ROI because he was able to stop using costly bolt-on apps, saving the company $648,000 yearly.

Dan's team increased pipeline production by 50% and total call volume by 20%. The simplified process has also decreased ramp-up time for new hires from 9 weeks to 6 weeks.

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— **Dan Miller-Smith,**
Director of Sales, Procore

Create what you imagine.