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How Iceberg transformed TaskRay's inbound sales funnel with accurate lead status and meeting tracking

TASKRAY
CUSTOMER ONBOARDING SUCCESS

"Now we understand exactly how many first meetings an AE can handle in a given month."

— Mike Davis
TaskRay's Vice President of Sales

Project Snapshot

Defining lead status and tracking first meetings with leads are notorious challenges for small to midsize SaaS companies.

TaskRay, the #1 onboarding and project management solution on the Salesforce AppExchange, wanted a faster way to see the status of all its leads and know for certain when the first substantive meeting with a lead takes place.

Iceberg RevOps designed two new operational frameworks that solve for gaps in tracking lead status and first meetings. These systems prompt sales and marketing for essential data that gives TaskRay clear visibility into activities at the top of its funnel.

Today, TaskRay's leadership can:

- automatically see the status, owner, and next steps for every lead.
- take better control over the length of deal cycles by tracking the status and outcome of every meeting.
- use new dashboards as an early warning system to gauge overall pipeline health.

TASKRAY

CUSTOMER ONBOARDING SUCCESS

- Project management and onboarding tool available on the Salesforce AppExchange
- Automatically connects to relevant CRM data
- Provides businesses in any industry with workflows to onboard new customers faster and more efficiently
- 30 employees

The Challenges

TaskRay's initial revenue operations infrastructure didn't support scalable growth.

"We struggled with reporting on the first meaningful meetings with prospects. We had a good feel for how many MQLs we were getting, the conversion percentage on opportunities, and our close rate. But in between the MQL step and opportunity creation, we needed our AEs to get on the phone with people who have a problem that we could potentially solve."

— Mike Davis, VP of Sales, TaskRay

Challenge 1

Tracking lead status

- Leads came to a single email address
- SDRs took the lead and assigned it to themselves
- Time-sensitive data kept in personal spreadsheets or calendars got lost
- Sales leadership invested more time verifying the accuracy of their reports

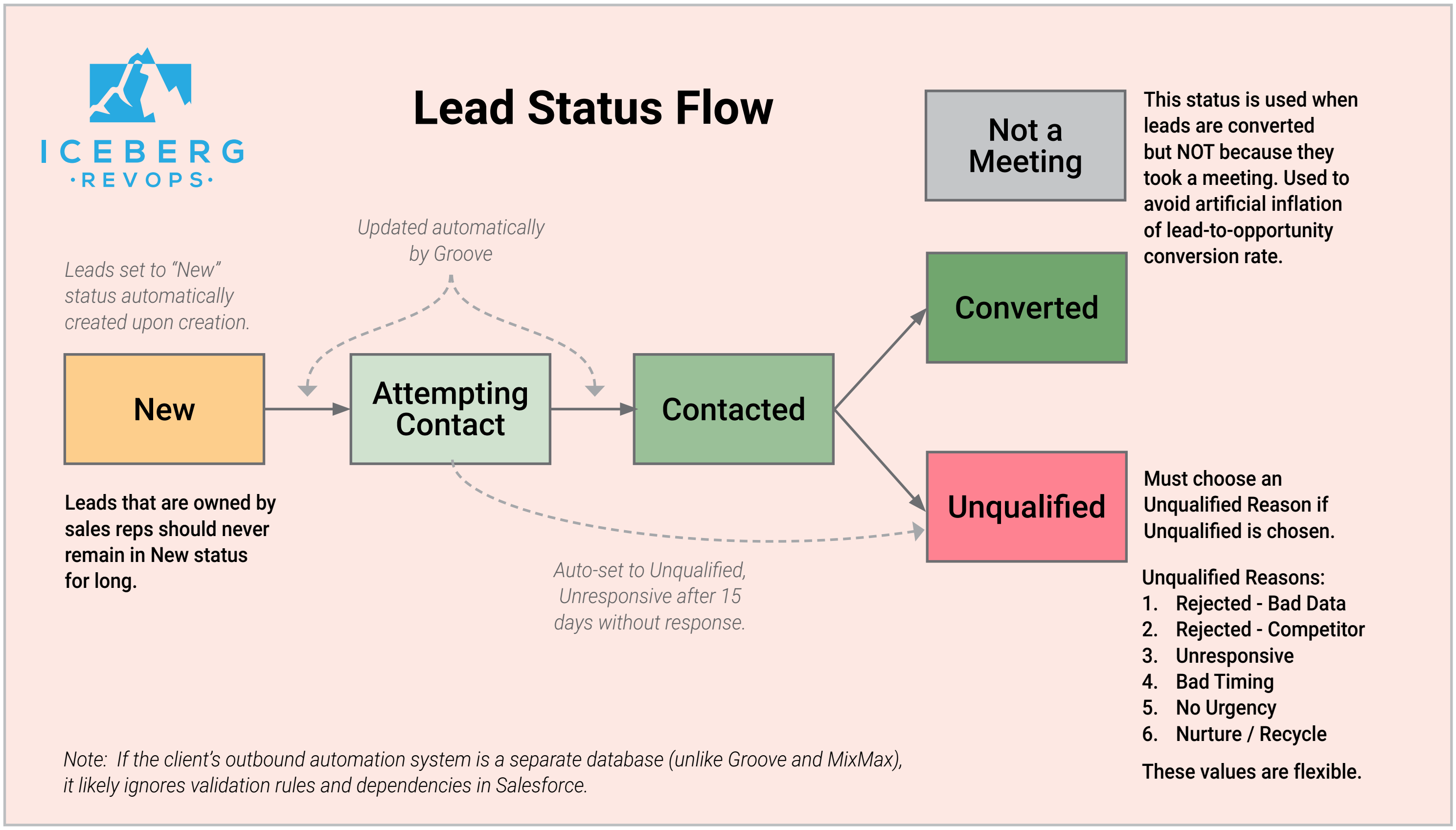
Challenge 2

Tracking the first substantive meeting with a lead

- Without a strong tracking process, it was difficult to know how many meetings between leads and AEs took place each month
- There was no mechanism in place to track pending meetings to help with pipeline forecasting
- Existing reports offered little insight into individual sales rep performance

The Solution

Solution for Challenge 1 *Better lead status tracking*



It's common for early-stage SaaS companies to entertain too many edge cases for lead status. The problem is, without a simple and clear set of lead statuses, following up with a lead becomes increasingly difficult.

Iceberg pared down TaskRay's number of lead status options to five.

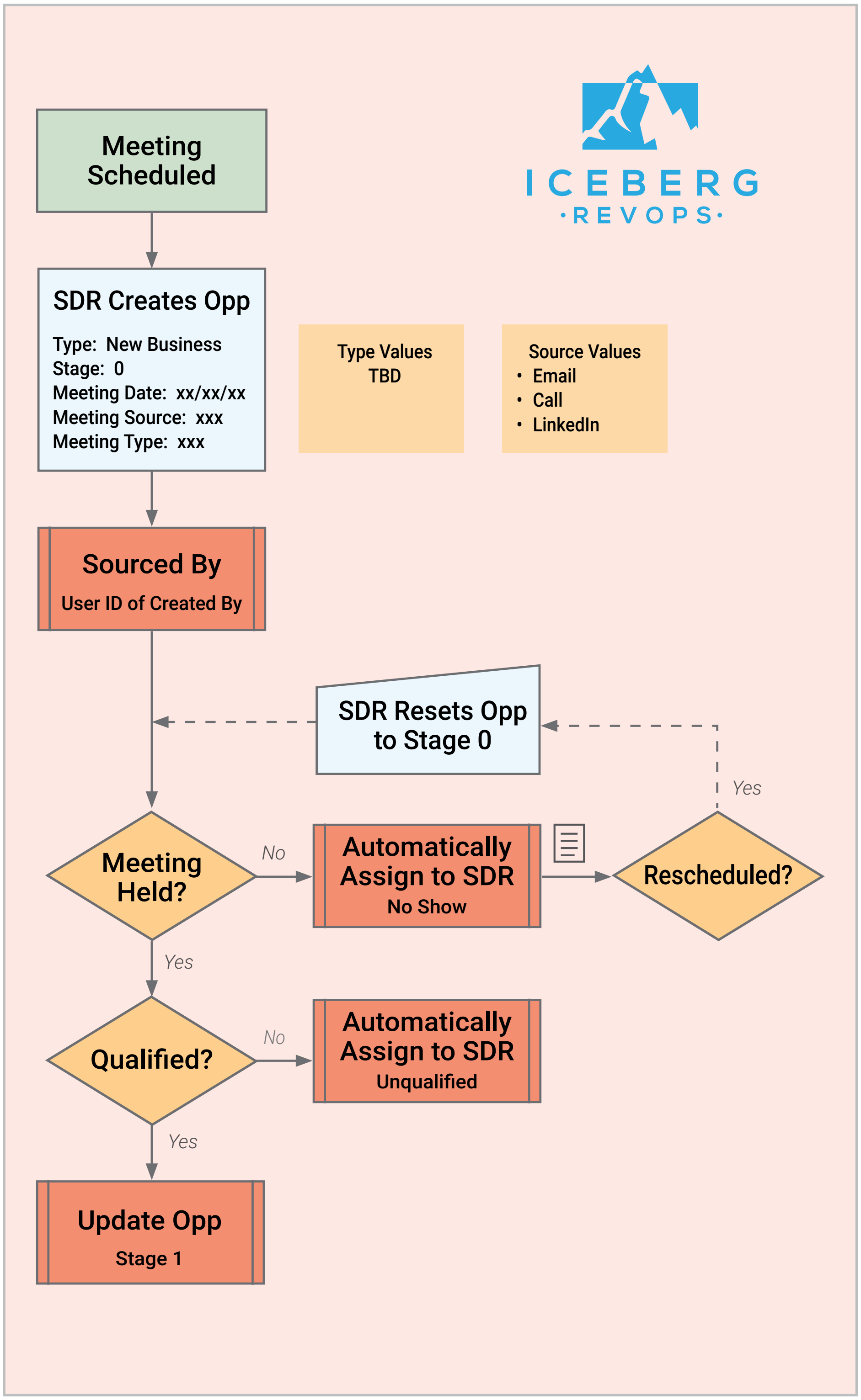
1. **New**
2. **Attempting Contact**
3. **Contacted**
4. **Converted**
5. **Unqualified**

This new lead tracking framework captures leads that convert for reasons other than a meeting along with important details as to why a lead becomes unqualified.

These insights allow TaskRay's sales and marketing teams to proactively reengage with leads down the road.

The Solution

Solution for Challenge 2 *Accurate meeting tracking*



Salesforce automatically tracks positive-outcome meetings when opportunities are created. But any meetings with alternative outcomes often slip through the cracks.

- Poor meeting
- Canceled
- No-show
- Pending (happening in the future)

TaskRay's new workflow tracks the nature of every meeting so Mike and his team can see the total number of meetings that happen in a month plus gauge their sales team's outreach capacity. The new framework also gives insights into individual sales performance by showing patterns in early meetings between sales reps and leads—making it easier to compare out-comes between reps.

The Results

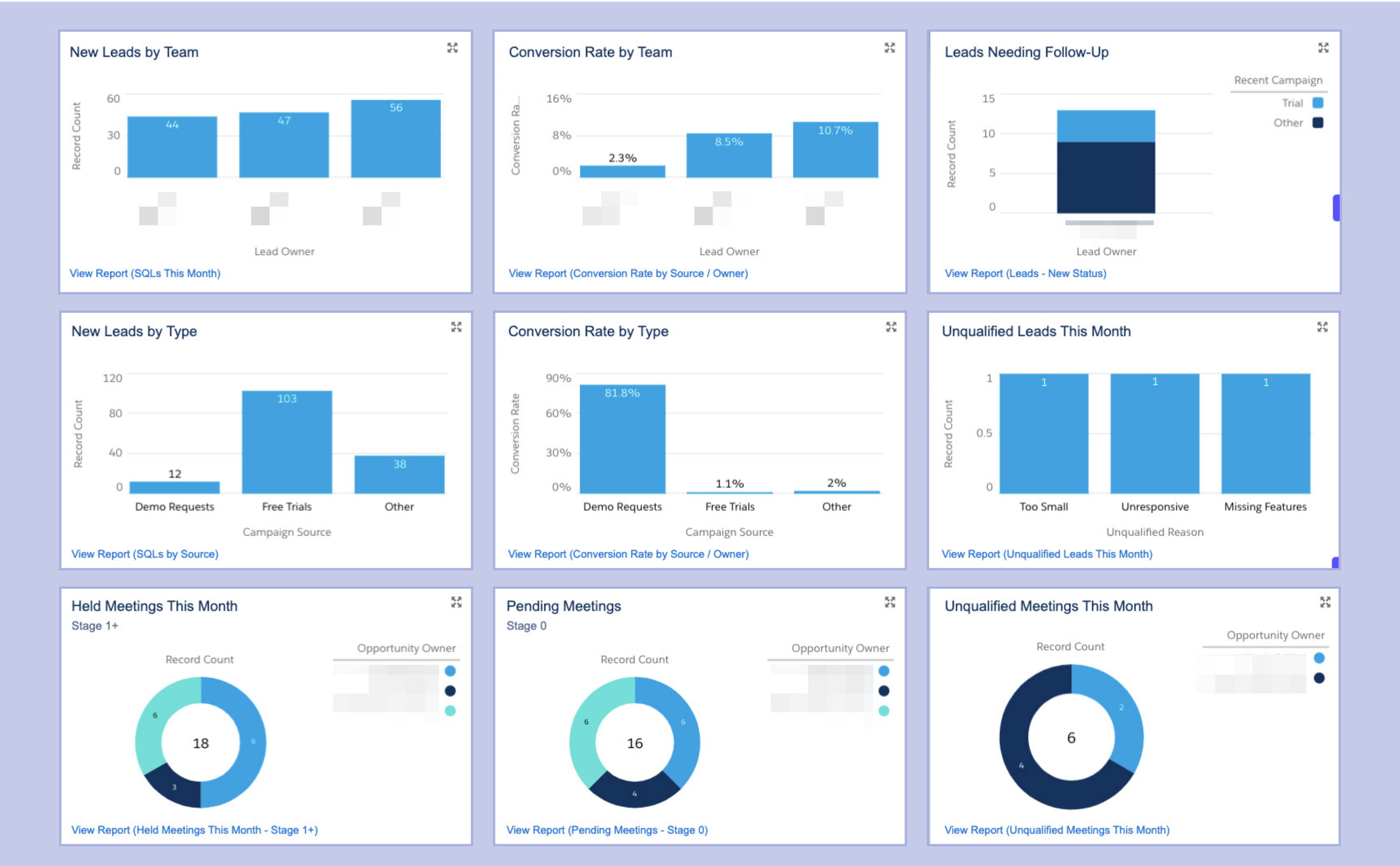
Dashboards that tell the full story of TaskRay's inbound sales funnel

Iceberg specializes in identifying the operational hazards buried deep inside a company's sales funnel. Reliable reports are the surface-level reward of extensive work beneath the revenue operations engine.

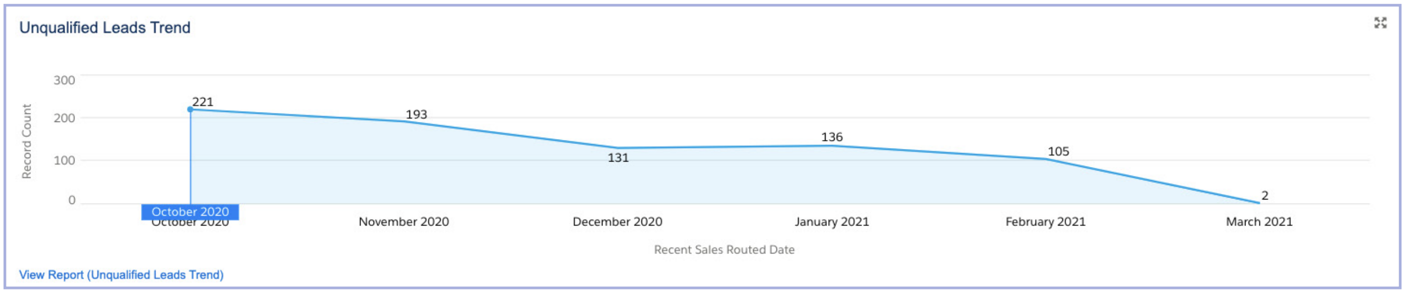
In the final step, Iceberg created dashboards that surface all the new data for TaskRay's lead status and meeting tracking.

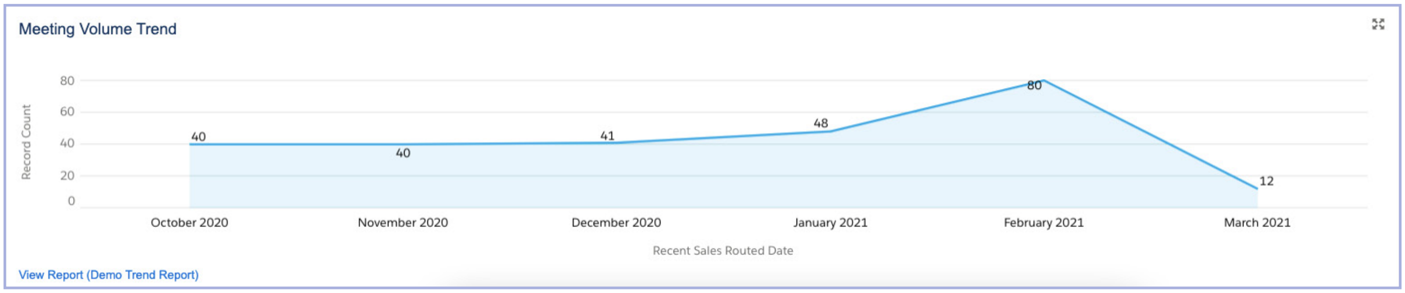
Now TaskRay's sales leadership sees at a glance:

- Leads that need follow up
- Number of meetings held in a month
- Number of pending meetings
- Number of unqualified meetings and owners
- Relationship of lead volume to meeting volume



Displaying metrics in a useful context helps TaskRay make strategic decisions faster, improves sales forecasts, and drives more tailored training opportunities for sales reps.





“One of the biggest wins for me has been the clarity provided in first meetings completed as a key metric for capacity.

That’s the process as well as the technology that Iceberg created for us. Now we understand exactly how many first meetings an AE can handle in a given month.”

— Mike Davis, VP of Sales, TaskRay

Ready for growth?

Iceberg can build operations that scale with you.

Find out how