SUCCESS STORY   △ canopy

Canopy Sees Connection Rates Surge by 20% with Playbooks

126%
increase in account engagement per quarter

22%
increase in connection rate

99.3%
improvement in Speed to Lead (avg. under 5 minutes)

The Background

Canopy provides accounting practice management software that's easy to use and easy to set up. They want to engage with inbound leads and follow up on key intent signals to reach out when potential customers are ready to talk.

The Problem

Canopy's sales team needed a way to connect customers' behaviors to quick and effective follow-up and struggled to find engagement strategies that targeted their ideal customer profile.

The Objective

Canopy went hunting for a solution that gave them better visibility into their reps' performance, insight into their customers' behaviors, could enable them to rapidly respond to customers by automating record enrollment, structuring activities, and integrating their intent data to prioritize tasks.

> " It turns out not all sales engagement is created equal. We tried two different platforms, neither of which could systematically enroll prospects based on intent or other CRM fields. We also struggled to manage high-priority inbound leads to be handled within minutes by whoever is available " right then.

Matt McNulty
Head of Revenue Operations

△ canopy

The Solution

Matt McNulty, Head of Revenue Ops, found in their search that "not all sales engagement solutions are created equal." After a careful audit of different tech, he concluded that Playbooks offered the best, seamless integration to their customized Salesforce instance.

They use Playbooks Automation Robots to constantly scan CRM fields, enroll records into Plays (a cadence in Playbooks). They use Shared Records to dramatically improve their speed-to-lead. And they use Prioritization to pull records into the appropriate Plays and order activities based on intent.

The Results

Since launching Playbooks, and heavily leaning into Shared Records, the Canopy sales team's lead response time dropped from 12 hours to under 5 minutes. Their engagement rates surged by over 22%, their marketing revenue per lead shot up an astonishing 126%, and 100% of customers are successfully onboarded.

The Numbers

126%
increase in account engagement per quarter

22%
increase in connection rate

99.3%
improvement in Speed to Lead
(avg. under 5 minutes)

"Playbooks prioritization helps us put the right prospects in front of reps with the right expectations, the right information, and the right Plays."

Matt McNulty
Head of Revenue Operations
△ canopy

Would you like to see similar results in your organization?

DEMO PLAYBOOKS >