

ZUMAN INCREASES BOOKED SALES MEETINGS BY 180% WITH VELOCIFY

Zuman

INDUSTRY

- HR and Payroll Outsourcing Services

PROFILE

- Founded in 2012
- Based in Pleasanton, CA
- Offers a comprehensive payroll, benefits, and HR outsourcing solution for SMB organizations that want to maximize growth and scale effectively

CHALLENGES

- Automate a very manual process for assigning sales activities to reps
- Improve overall productivity of the sales team
- Better visibility into sales process effectiveness and pipeline velocity

SOLUTION

- Velocify Pulse™
- Velocify Dial-IQ™
- Salesforce
- Marketo

RESULTS

- Increased booked sales meetings by 180% in the first month
- Increased connections by 55% within two months of using Velocify Dial-IQ with local presence.



BUSINESS CHALLENGE

Zuman was founded in 2012 by seasoned HR executives that identified a real market gap for an integrated human resource outsourcing solution that combines software plus expert services. The company officially launched its solution in early 2014 and has been growing rapidly ever since, driving the need for more sophisticated solutions to help Zuman maximize revenue opportunities.

“The bottom line for us was to get extremely efficient with our sales process in order to reduce our customer acquisition costs,” said Mike Triantos, chief revenue officer at Zuman.

Before Velocify®, Angela Hunter, the marketing and sales operations manager at Zuman, spent almost her entire week monitoring data from different systems and bubbling up opportunities for the sales development team. She would identify lists of contacts that required a call or email follow up, new leads that needed attention, and tasks were manually assigned to sales development reps through Salesforce. Additionally, sales reps were moving from one application to another to make calls, log activity, and get insights, creating even more inefficiencies in the process.

SOLUTION

WHY ZUMAN CHOSE VELOCIFY

Hunter, who was driving the selection process for a new sales acceleration tool, came across Velocify late in the process. Not wanting to go down the path with another vendor, she was hesitant, but decided to do her due diligence and took a meeting, not expecting she would change her mind.

“I went in very skeptical,” said Hunter. “I pushed pretty hard, trying to find holes, but didn’t find any. Everything I needed was there, and the solution was way better on every level than any other tool I had evaluated.”

The biggest benefits of Velocify Pulse were the productivity gains, the ability for sales reps to have everything they needed in one screen, and the ability for Hunter to manage the entire sales process from a central hub.

Hunter also liked the fact that Velocify Pulse integrated with tools she was already using, such as Marketo and Salesforce, and she liked the ability to map out her sales process within Velocify Pulse, exactly the way she wanted. Hunter didn't have to change their sales process to fit the solution.

"IMPLEMENTATION WAS AMAZING"

Hunter raves about the implementation process with Velocify. At the time of implementation, her plate was very full, and she noted that the Velocify implementation team was very hands on.

"The team at Velocify did so much of the work for me," said Hunter. "From building out sales process workflows to training the team. There seemed to be no limit to how much support I could expect."

"ALL MY TOOLS ARE COMING TOGETHER BECAUSE OF VELOCIFY PULSE"

Salesforce and Marketo were just a start for Zuman. To achieve their sales process efficiency goals, they knew a full sales stack was necessary. As they began to piece together their stack, there were a few core solutions, and Velocify Pulse was one of them.

"Velocify Pulse has been the solution at the core of our sales stack," said Hunter. "I run all of my processes through Velocify Pulse, and it just knits everything together for me. All of my tools are coming together because of Velocify Pulse."

IMPROVING THE SALES PIPELINE

As with most high performing companies, Zuman's marketing and sales teams run structured campaigns that drive outbound opportunities. They use Marketo scoring, and when any contact record reaches a certain score, Velocify Pulse assigns the contact to a business development manager. Velocify Pulse then helps automate the ideal call and email campaign, based on a pre-defined sales process.

The efficiency driven by Velocify Pulse at the front end of the funnel is driving incredible results for Zuman. In just four months, Zuman increased booked sales meetings by 180 percent. And when Zuman added Velocify Dial-IQ with local presence, the sales team realized even greater efficiency gains, increasing connection rates by 55 percent in just two months.

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Angela Hunter,
Marketing and Sales Operations Manager, Zuman

"Adoption by Zuman's sales development group has been a breeze. They live and breathe in the system," noted Hunter. The outside sales team is using the tool as well, but Hunter wants to see even more utilization as they fully build their sales process, stages, and activities into Velocify Pulse. Hunter is particularly fond of the "take action" capability within Velocify Pulse. As the company sets up actions to map to the broader sales process, all Zuman's sales reps will have to do is log their sales actions, and Velocify Pulse will remind them when it is time to follow up with a contact.

Velocify Pulse has helped free Hunter's sales reps from the "what's next dilemma," so they can focus on what they need to do to better engage with a sales prospect.

COMPANY OVERVIEW - ZUMAN

Zuman was founded in 2012 by seasoned HR leaders that worked together for over a decade in the HR outsourcing industry. Together, they were instrumental in successfully creating and bringing to market solutions that changed the way businesses handled HR. Today, Zuman is a complete HR BPaaS partner that offers a comprehensive payroll, benefits, and HR administration solution to small and medium-sized business organizations that want to maximize growth and scale effectively. By aligning HR and finance leaders, Zuman amplifies the business value of HR outsourcing by providing its clients with greater control, automated processes, and strategic visibility.



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