

Branch sees a 10x increase in deal reviews, is 2x more accurate in forecasting and recaptures 57,000 contacts.

The logo for Branch, featuring the word "branch" in a lowercase, sans-serif font. To the right of the text is a stylized tree icon with three blue dots at the top of its branches.

Industry

Marketing Attribution

Headquarters

Redwood City, CA

Employees

400

Sales Team

50

Results

- 10x increase in deal reviews per week
- 2x more accurate in forecasting deals
- 57,000 untouched contacts discovered
- AI-driven risk assessment and deal prioritization

Branch is the gold standard in mobile growth. Branch's deep linking and mobile attribution help you build great user experiences and measure your users' journeys.

The team at Branch deals with a very high volume of sales opportunities. With each salesperson juggling several dozen deals, their forecasting process within Salesforce was chaotic. Like most instances, it required lots of custom work to get right, and even then, it was far from perfect. In addition, sales stage progression and forecasting relied on gut-feeling from sellers, and it was difficult to examine the entire pipeline, get a full understanding of deals, their progression, and potential risks.

Further, while their sales process keeps a close eye on contacts actively involved in a deal, they don't track other people who may be CC'ed on emails or attend meetings that later become a Branch user but aren't actually in the CRM.

CHALLENGES

Lack of visibility.

The CRM alone did not provide enough insight into each deal and required much custom work to get any insights. In addition, key activity data was also missing.

Seller-reported forecasting.

Manually entered data and "gut feelings" result in inaccurate forecasts and lots of manual work from the Operations team.

Ineffective deal prioritization.

With an extremely high volume of deals, sellers were struggling to prioritize activities and deals.

Inaccurate forecasts.

Forecasts were inconsistent and not always accurate—required lots of manual reporting in spreadsheets that was time-intensive.

BOOSTUP VALUE

Complete deal insights.

BoostUp provides Branch with deal complete deal insights, allowing them to get more context into each deal, improving win rates and deal progression.

Objective risk scoring.

BoostUp's AI-driven risk scoring and sentiment analysis for evidence-based deal progression eliminate human error and has led to a more accurate forecast.

AI-guided deal prioritization.

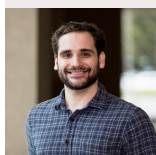
BoostUp has helped Branch prioritize deals. With an AI that monitors every deal for signs of slippage, BoostUp automatically prioritizes seller tasks for maximum sales performance.

Accurate, more reliable forecasts.

BoostUp has helped Branch improve forecast accuracy by 2x.

“

BoostUp gives me x-ray vision I feel. With BoostUp, I can inspect pipeline in 1/10th of the time, call deals 2x more accurately, which helps us as an organization forecast more efficiently and reliably. Our sales leaders now have an excellent lens to evaluate deal risks instantly.”



Stephen Daniels
Head of Revenue
Operations,
Branch

Results

Branch immediately benefitted from BoostUp upon implementation when the platform uncovered 57,000 contacts that were completely unleveraged by marketing or customer success. They were discovered on calendar appointments, CC'ed on emails, and other locations where they were involved in the selection and implementation of Branch. All of these contacts were then correctly associated with the right accounts and opportunities by BoostUp. BoostUp flags all missing contacts from email inboxes, identifies "true" engagement as well as the accurate number of people involved in a given sales cycle, including post-sell.

“ Our sales teams love BoostUp and are highly active users. If we have a problem we want to tackle, we always think, Can BoostUp do this - we are utilizing BoostUp as a catalyst to help solve these problems.

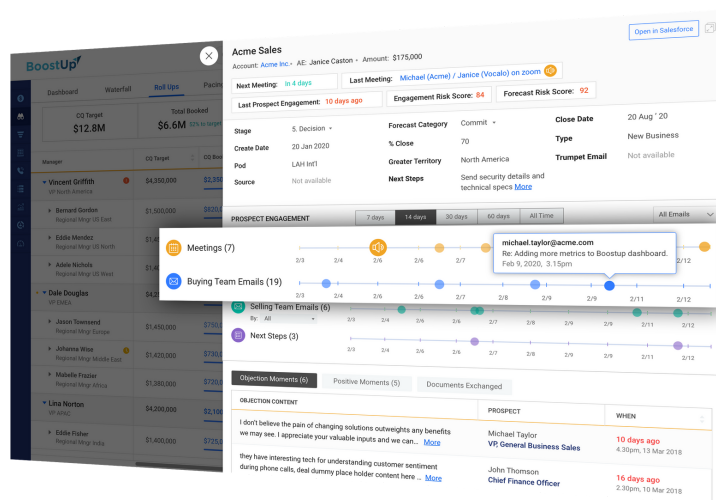
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Stephen Daniels
Head of Revenue Operations

Further, Branch now benefits from complete visibility into their pipeline, as well as every deal within it. On a macro level, they can examine how they are trending towards their goals and in relation to their forecast. BoostUp measures deal risk based on engagement and the sentiment of those engagements. Risk scoring allows Branch to identify, track, and impact deal momentum quickly. This is something they couldn't do before BoostUp.

On a more micro level, the team can examine each deal, down to the activities made against it. BoostUp provides sentiment analysis of every opportunity, as well as an AI-generated risk score.

This allows for AI-driven activity prioritization, so the reps working a large number of opportunities know exactly what requires their attention and what they must do to be successful. These insights have also enabled an evidence-based approach for deal progression rather than gut-feeling, resulting in more accurate forecasts.



BoostUp demo data - not actual customer data.

“ BoostUp provides us with full context and sentiment for everyone interaction, every touchpoint, and allows us to progress each deal with confidence. It seems simple, but today's tools involve a lot of time wasted to stitch together the story, and it still loses context. BoostUp's visualization tools help us do this in just a few minutes.

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Navid Zolfaghari
VP, Sales, Americas