axiom

USES TROOPS TO BRING CRITICAL DATA VISIBILITY TO THOUSANDS OF EMPLOYEES AND KEEP TEAMS FULLY ALIGNED AS THEY SCALE

Sales team reporting and data hygiene has improved by consolidating Salesforce workflows in Slack, too

INDUSTRY	HQ	TEAM SIZE
Legal Services	New York	2,000+

A rapidly growing team and traditional email alerts meant big communication gaps

Axiom Law, a leading tech-enabled legal services provider, certainly has had no problem growing. From a founding home base in New York City, Axiom has since opened 17 offices across North America, Europe, and Asia. While the growth has been exciting, communicating key business data - particularly Salesforce data - became a big challenge.

"Teams were getting over 100 CRM emails a week for meeting and Opportunity notifications. It became incredibly cluttered and inefficient" said Ops team member Dylan Hofstetter.

Because of this, important changes were being missed or ignored and kudos and shout-outs were clogging up inboxes.

TAKEAWAYS

Axiom Law was growing quickly, which meant **communicating CRM data amongst teams** became difficult.

They brought in **Troops**, which **automatically kept the team in sync** by delivering the **right info at the right time** - in Slack.

Teammates now feel fully aligned, including those without Salesforce licenses.

Also, **senior leaders** have **increased data visibility** and CRM hygiene has improved.

> "
> Bringing on Troops has been one of the most game-changing moments for us as a business this year. We are now running big parts of our business via the integration.
>
> *Bryan Caplin, SVP Sales and Ops*

The problem was, as expected, even more acute across the Sales team. Data was scattered across Salesforce, email, and offline trackers. Opportunity info wasn't being updated and a key activity function - meeting dispositions - weren't being marked in Salesforce properly. Reporting became an issue.

"Senior sales had trouble taking stock of their week to week and month to month progress and reporting up to C-level stakeholders" said Charlie McClelland, a member of Engagement Success.

Taking a look at Troops

To help improve overall communication, the Axiom team implemented Slack. They quickly realized it was the best place to coordinate across teams and regions, but the data knowledge gap problem with Salesforce persisted.

When Axiom heard about Troops and its goal to deliver customizable workflow and reporting from Salesforce seamlessly into Slack, they saw a big opportunity to consolidate processes and increase visibility.

Troops helps keep Axiom fully in sync - even those without a CRM license

The impact of bringing Troops on board was immediately felt. Over half of Axiom employees do not have a Salesforce license, and now have targeted insights from the activity Troops is posting around lawyers and their engagements, which has been key to their success. Because Axiom can customize Troops to send to the specific channels or people that need to know a particular item, noise has been reduced and everyone knows the exact same information. Data has been democratized.

⬛ **Troops** APP
New F/U Meeting!

Created By: Bryan Keller
Assigned To: Bryan Keller
Due Date Only: Jan 08, 2018
Related To: ▓▓▓▓
Type: Follow-up Meeting
Meeting Type: Phone
Subject: Contracts Platform Introduction
Description: Kathy requested a formal introduction to contracts platform - was a big topic of discussion during our lunch
Name: ▓▓▓▓

With Troops, Axiom shares important Salesforce activity

For the Sales team, Troops has greatly improved data hygiene and team performance. Close dates that were in the past are now being updated, and meeting dispositions are being updated quickly.

For managers, the improved data and Troops scheduled reporting has led to better business outcomes across planning, prioritizing, and forecasting. Leaderboards are shared regularly, driving individual accountability. The whole team rallies around wins, improving morale and providing a shared sense of mission across regions.