



Drift's transformation through integrated pricing & quoting with DealHub

DRIFT | Case Study

In the rapidly changing digital landscape, businesses tirelessly work towards seamless internal communication while adapting to shifting client demands. Drift, leading the charge in sales automation and integration, faced multiple challenges that could hinder its growth. Drift needed an enterprise-grade CPQ solution integrated into its Salesforce CRM to support an agile and automated Configure-Price-Quote process.

Challenges

Communication barriers within an organization

Seamless inter-departmental communication is pivotal for efficiency. When information remains trapped in silos, and collaboration between departments is limited, the repercussions are felt through prolonged decision-making times, which can culminate in missed opportunities or strategic misalignments.

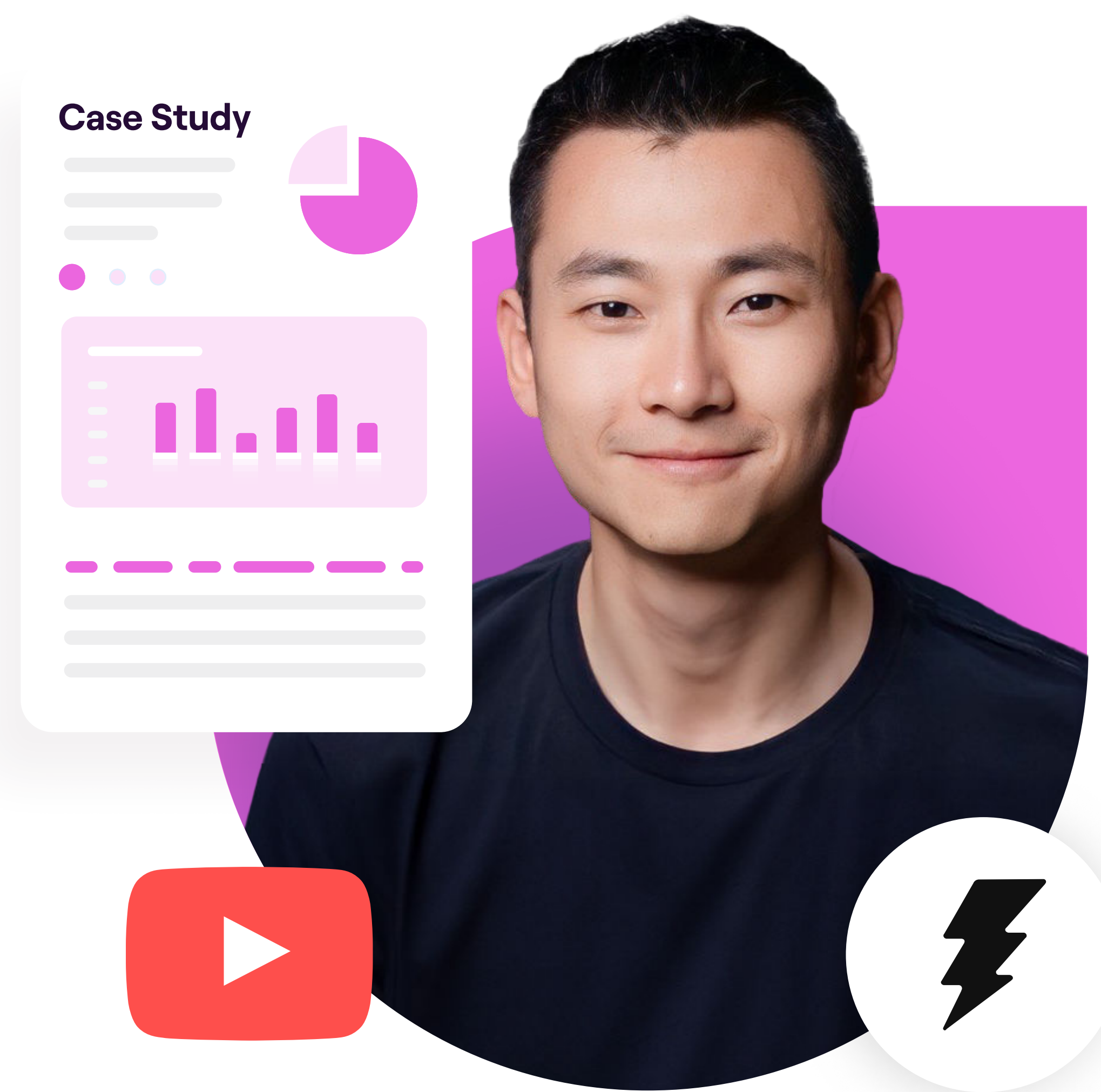
For Drift, these challenges underscored the pressing need for enhanced communication and collaboration tools. Their operational intricacies demanded a solution that could cohesively bring together various departments to accelerate their expansion into higher-tier markets, ensuring real-time alignment. The repercussions of siloed data and communication bottlenecks could jeopardize their ability to make swift, informed decisions, essential for retaining their market leadership and standing with customers.

Delay in notifications and updates

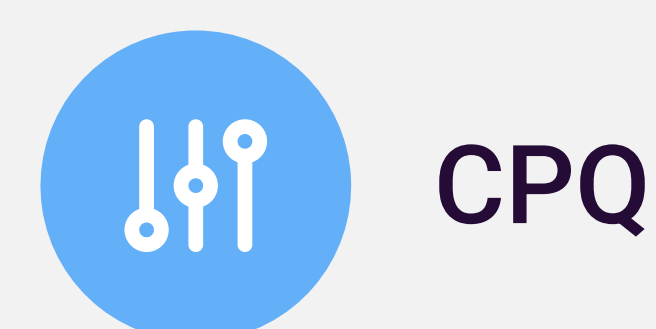
In high-stakes business scenarios, the timeliness of updates isn't merely an added advantage—it's essential. Delays in relaying critical information can trigger a domino effect, leading to misunderstandings, missed opportunities, or tangible fiscal repercussions. This urgency becomes even more amplified in realms like sales, where every moment can be pivotal—distinguishing between securing a deal and letting a potential client slip away.

Recognizing the inherent risks of communication lags in their domain, Drift prioritized a platform that would ensure instantaneous feedback loops, mitigating potential pitfalls and enhancing their response agility.

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Solutions Used



We faced challenges, like any growing business. But it was our commitment to innovation and truly understanding our clients' needs that propelled us forward. Today, our solutions not only address our pain points but set a benchmark for sales operations everywhere. We did this with Dealhub CPQ"



Marty Chang

Director of Business Operating Systems & Strategy, Drift

About Drift

Drift®, the Conversation Cloud company, helps businesses connect with people at the right time, in the right place with the right conversation. Using the Drift Conversation Cloud, businesses can personalize experiences that lead to more quality pipeline, revenue and lifelong customers. Drift brings Conversational Marketing, Conversational Sales and Conversational Service into a single platform that integrates chat, email and video and powers personalized experiences with artificial intelligence (AI) at all stages of the customer journey. More than 5,000 customers use Drift to deliver a more enjoyable and more human buying experience that builds trust and accelerates revenue. Representing less than 1% of unicorns led by Latino founders, Drift is building an equitable, enduring company to transform the way businesses buy from businesses.

Not prioritizing customers' needs

At the heart of a thriving business is its ability to discern and respond to the unique needs of its clients. When there's a disconnect between a company's offerings and the genuine requirements of its clientele, the repercussions can span from client dissatisfaction and diminished loyalty to measurable setbacks like revenue loss.

Drift comprehended the necessity of continuously adapting and molding its operations to resonate with the dynamic needs of its clients. The obstacles they encountered, such as communication hurdles, inefficiencies in sales procedures and quoting accuracy, or lags in real-time information dissemination—had the potential to erode their client trust and, by extension, their revenue stream.

User inconvenience due to multiple clicks

In the digital epoch marked by the demand for instant results, the nuances of user experience take center stage. Even an extra click can tilt a user's interaction with a platform, dictating whether they remain loyal or scout for alternatives. An interface that makes users meander through multiple layers to reach frequently used functions can instigate user dissonance, reduced engagement, and bottlenecks in their workflow.

Drift grasped the imperative of offering its users a seamless interface where vital functionalities were just a click away. They knew all too well that concealing essential features behind several layers could stifle efficiency and might even compel users to pivot towards more user-friendly platforms.

Changing dynamics of RevOps tools and methodologies

In the ever-shifting sands of the technological arena, constant evolution is the name of the game. Businesses anchored to dated systems face a trio of threats: operational inefficiencies, diminishing competitive standing, and, at its worst, the looming shadow of irrelevance.

In the nexus of sales automation and integration—a domain intrinsically tethered to tech advancements—Drift recognized the urgency to remain at the vanguard of innovation. They knew that adhering to antiquated methodologies would not just hinder their ascent but could also render them a relic in a rapidly advancing marketplace.

Lack of real-time assistance for salespeople

Sales interactions, especially live ones, are dynamic. Salespeople can significantly benefit from on-the-spot insights or guidance, especially when handling challenging situations or complex deal configurations.

Sales exchanges, particularly those in real-time, are fluid and often unpredictable. Navigating these interactions adeptly can determine the outcome of a potential deal, especially when salespeople encounter unexpected challenges or intricate negotiations. Immediate insights, analytics, or real-time guidance can prove invaluable, enabling salespeople to respond effectively and possibly sway an interaction in their favor.

Contextualizing this within Drift's decision to integrate DealHub's solutions sheds light on their forward-thinking approach to sales operations. Drift, operating in the sales automation and integration sector, understands the intricacies and nuances of sales interactions better than most. They recognized the pressing need for sales teams to have immediate access to insights, feedback, or pertinent data during live interactions.

Need for faster data retrieval and analysis

In the modern business landscape, decisions anchored in data reign supreme. This data-driven approach ensures informed and effective strategies, eliminating reliance on intuition alone. But for data to truly be an asset, it must be swiftly accessible and ready for analysis, ensuring decisions are made in a timely and responsive manner.

Drift recognized the pivotal role that instant access to data plays in crafting optimal sales strategies. In a world where speed and precision are paramount, they understood that any lag in data accessibility or analysis can be a roadblock to efficient operations and timely decision-making.

Solutions

DealHub's unified solution

Implementing DealHub provided Drift with a unified platform that bridged the communication gaps. The integration of tools like Slack, for instance, ensured real-time notifications, eliminating delays and keeping everyone updated. This move towards a more integrated, collaborative environment meant that Drift could be more responsive, agile, and client-centric. By choosing DealHub, Drift demonstrated a proactive approach to resolving the challenges of communication and collaboration that many organizations face, ensuring they stay ahead in the dynamic digital landscape.

Slack integration for real-time updates

Through its strategic integration with Slack, DealHub has significantly enhanced its user experience. This integration allows for instantaneous notifications sent directly to users, eradicating the need for them to sift through multiple platforms or wait for crucial updates. Instantaneous alerts regarding feedback, approvals, or comments ensure that users are always in the loop.

Moreover, DealHub's distinct functionality facilitates seamless liaising among salespersons and various organizational departments. This consolidated communication framework simplifies business operations and speeds up decision-making and strategy deployment.

Recognizing the potential in this integrated approach, Drift adopted DealHub, ensuring that real-time notifications kept their teams constantly updated. No essential update—from a pivotal sales briefing to client feedback or pressing approvals—goes unnoticed.

By choosing DealHub, Drift made a calculated move to bolster its operations, demonstrating a proactive approach to mitigating communication delays. This initiative underlines Drift's dedication to harnessing top-tier tools, optimizing efficiency, and fostering long-term client satisfaction.

Adopting a client-centric approach

Understanding and addressing the unique challenges faced by customers is paramount. It's more than just good service—it demonstrates the value a business places on its clients. Going the extra mile with personalized implementations not only meets immediate needs but also cultivates enduring relationships.

DealHub's platform offered a suite of solutions that directly addressed these concerns. One such benefit included DealHub's ability to deliver locally based (in the US) and ongoing support via Customer Success to nurture the partner relationship beyond implementation. By adopting DealHub, Drift could ensure that its sales processes were streamlined, inter-departmental communication was fluid, support was on-demand, and real-time updates were always available. This not only enhanced internal operations but also translated to a better, more responsive service for their clients.

In essence, Drift's decision to leverage DealHub's capabilities was a strategic move to ensure they remained attuned to their clients' needs. It showcased their commitment to continuous improvement and their determination to uphold a high standard of client satisfaction, recognizing that in doing so, they secure their success and growth in a competitive marketplace.

Optimizing ease-of-use

DealHub's dedication to improving the user experience is evident in its continuous innovations. By streamlining user interactions and cutting down on the number of clicks, the platform not only promotes efficiency but also heightens user satisfaction and trust.

Taking user feedback to heart, DealHub made a seemingly simple yet impactful change: decreasing the clicks required to copy a proposal link. Such attention to detail underscores the platform's commitment to client-centric development. It serves as a testament to how even minor adjustments, driven by user feedback, can profoundly elevate a product's ease of use.

By natively integrating DealHub in its Salesforce CRM, Drift was able to offer a more user-friendly experience, reducing the number of necessary interactions to access critical features and optimizing workflows. Such optimizations, while seemingly minor, can compound over time, leading to significant time savings, enhanced user satisfaction, and improved overall efficiency.

In sum, Drift's decision to employ DealHub's solutions was a strategic move to prioritize the user experience, understanding that in an age where every click counts, streamlined operations can be a significant differentiator and a catalyst for sustained user engagement.

Evolution of RevOps tools

Continuously updating and adapting to new tools and methodologies ensures businesses stay ahead in the competitive curve. Embracing data analytics and other tools can provide invaluable market insights.

DealHub's platform offered a confluence of modern solutions tailored to meet the challenges of the contemporary sales landscape, not just on a product level but on a sales organization, customer, and Revenue Operations level. By integrating DealHub, Drift positioned itself at the forefront of technological advancement. The platform promised streamlined operations, real-time communication integrations, and a user-centric approach—factors pivotal for businesses wanting to thrive in the digital age.

Drift's decision to adopt DealHub's offerings underscored their commitment to innovation and adaptability. It was a proactive move, signaling their intent to not only remain relevant but also to set industry standards by leveraging DealHub's cutting-edge and agile solutions that address both present needs and anticipate future challenges.

Utilizing generative AI

Seeing the potential in generative AI, which can produce content, recommend coding enhancements, or even undertake particular tasks autonomously, Drift believed AI tools could significantly assist salespeople, especially during live interactions, by offering real-time analytics, insights, or advice.

Drawing from the success of GitHub Copilot in the development realm, Marty suggests that similar advantages could be reaped by sales and revenue operations teams, streamlining their processes and boosting efficiency.

Drift's choice to implement DealHub's solutions was a testament to its commitment to empowering its sales teams. They aimed to arm their representatives with real-time tools and insights, ensuring they were best positioned to handle the intricacies of live sales interactions and, consequently, increase their chances of successful deal closures.

GPT integration in Slack

Harnessing the power of GPT's natural language processing capabilities and integrating it with platforms like Slack can revolutionize data retrieval speeds. Additionally, it can facilitate rapid analysis, delivering insights right within chat conversations.

DealHub's unified platform offers a streamlined approach to data management and real-time communication. By leveraging DealHub, Drift ensured their teams had instant access to critical data, facilitating quicker analyses and decisions. The platform's integration capabilities, especially with tools like Slack, also mean that data-driven insights could be communicated rapidly across teams, ensuring everyone was aligned and informed.

In essence, Drift's adoption of DealHub's solutions reflects its commitment to cultivating a proactive, data-driven culture. They recognized the pivotal role of swift and accurate data access and analysis in modern business decision-making. They chose a platform that could deliver on this imperative, thereby enhancing their overall operational agility and competitiveness.

Summary

Drift embarked on a mission to modernize its sales operations, facing many challenges. These obstacles encompassed issues like communication hurdles between departments, delays in real-time updates, concerns about prioritizing client needs, and the ever-evolving landscape of Revenue Operations.

To tackle these challenges head-on, Drift adopted a multifaceted approach. They prioritized accuracy in complex configuration tasks and streamlined their quoting process. Key solutions came in the form of DealHub's agile Configure, Price, Quote (CPQ) system for a seamless quote-to-revenue processes, Slack integration for instant notifications, a renewed emphasis on client-centric solutions, and the incorporation of generative AI for real-time sales insights.

Throughout their transformative journey, Drift consistently embraced innovation to overcome every obstacle. Today, Drift stands as a shining example of how agility and forward-thinking can drive success in the contemporary sales landscape.

**See what DealHub
can do for you!**

[Request a Demo](#)