

Betterworks customer story

“Nue’s Lifecycle Manager has been a game changer for our team.”

Elise Fujimoto

Customer Success Operations Manager



100%

rep adoption within one quarter

20%

time saved for Finance

100%

ownership of revenue expansion by CS

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FTE hires for Finance order management

Company

Betterworks develops best-in-class performance management solutions that enable exceptional results and put employee experience at the heart of how companies align, motivate, retain and develop their people.

betterworks.com

Headquarters:

Menlo Park, CA

Industry

SaaS

Key features

Price Builder

Quoting

Lifecycle Manager

Analytics

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It's been a huge efficiency gain. Our Finance team used to be involved with every single proration. It's hard to quantify the value of using Nue because the process was ongoing, and now it's automated.



Elise Fujimoto

Customer Success Operations Manager

The problem: Tracking the entire customer journey in spreadsheets wasn’t working for Betterworks

Betterworks provides a modern performance management system (think OKRs!) to HR professionals. But their old-school quoting process — Excel spreadsheets — were getting in the way of their productivity and ability to scale, not to mention inhibiting the creation of a cohesive revenue data flow.

“I used to have to pull out my phone and pop open the calculator anytime I needed to multiply months and users and per user per month cost,” says JJ Heinrich, Senior Account Executive at Betterworks, “and I’m definitely not a math guy.”

Spreadsheets might be easy initially, but they just weren’t working as Betterworks innovated a sophisticated, hybrid pricing and a land and expand customer journey, which included:

- Recurring pricing models
- Custom discounts applied for each quote
- Price uplifts given year over year
- Special pricing for each product implementation phase
- Ramp discounting for their user licenses
- Quarterly true-ups

Mid-term prorationations were a massive, ongoing project for Betterwork’s CS and Finance teams. Their lack of an automated process caused a significant amount of work hours spent inputting quotes and handling prorationations manually. Their lack of a cohesive quote-to-cash system was hurting Sales, RevOps, CS, and Finance.

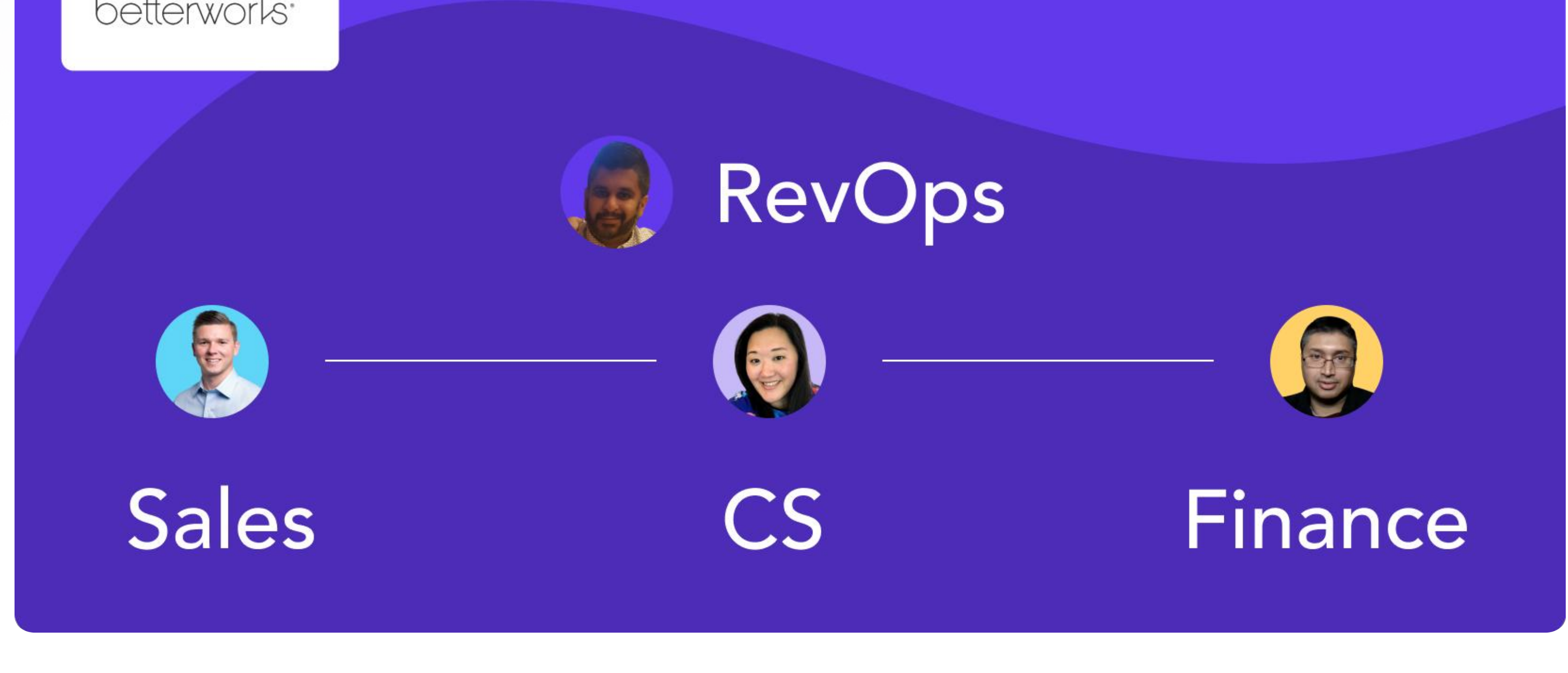
The opportunity: A Salesforce native tool that puts Sales, CS, RevOps and Finance on the same team

Betterworks needed an opportunity-to-cash system that would bring their quoting into the 21st century. They also wanted to implement a quote-to-cash process that was easy to use and would ensure accurate revenue and renewals data. But they absolutely didn’t want to stick in an unwieldy traditional CPQ that would limit their company’s ability to experiment with pricing in the market and Sales and CS agility to manage a creative customer journey.

Nue stood out immediately for its easy to implement, end-to-end functionality across the customer journey and ability to support innovative pricing. Nue’s lifecycle manager has cross-functional visibility and adaptability, including the ability to automatically calculate prorationations, renewals, and upsells in real time. All those revenue metrics flow automatically into Finance. The numbers are laid out right in front of each team, and updated automatically.

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“With Nue, our leadership team, Ops team, and Finance team speak the same language as we’re going through our processes,” says Elise Fujimoto, Customer Success Operations Manager.



This cross-functional collaboration would empower Sales to work more efficiently, and CS to function more independently, without constant Finance intervention. Raj Sinkar, VP of Finance says: “I think a huge benefit of Nue is being able to transfer a lot of the upsells of renewal work to the CS team, who is actually the team that’s working hand in hand with the customer.”

Nue was a frontrunner for Betterworks because it enables Sales and CS to manage the end-to-end customer journey natively in Salesforce. “Because Nue is native to Salesforce, we can trust that the underlying data is consistent across all of our deals,” says Alay Shah, Director of RevOps.

The results: A streamlined, automated Deal Desk for new business

Given their hybrid pricing model, custom discounting, and other sophistications in new business acquisition, streamlining Betterworks’ Deal Desk processes would have been too much for a system which can’t handle complexity. Fortunately, Nue was there to automate and allow for inter-departmental calculations in real time.

Nue’s Price Builder and Quote Builder immediately made complex quoting a breeze by eliminating repetitive work slowed down by departmental hand-offs and human error.

Nue also kept the end-to-end process of quoting running efficiently without the need for further hires. “With Nue, we could automate a Deal Desk team with existing personnel,” says Raj. “This also helped facilitate and improve teamwork between Sales and Finance.” Cross-operational quoting has broken siloed workflows and allowed the Betterworks team to do more with less.

A modern, beautiful CPQ with rapid implementation and adoption

Right away, Betterworks noticed the ease of use in Nue’s intuitive, elegant design. “The UI was a huge differentiator from a lot of the other CPQ tools I’ve used,” says Alay. “Other tools tend to look like giant Excel sheets. Nue looks like a sophisticated mobile application.” This sophisticated UI experience quickly made Rep’s use of spreadsheets a thing of the past, saving everyone time and the company overall headcount.

The team was also impressed by the ease of implementation. “Companies don’t like change. Everyone’s usually skeptical of new technology,” adds Alay. “But with Nue, we had a very quick and smooth adoption.” After a couple of quick enablement sessions, the Sales team was able to begin quoting. “And after that, the RevOps team really hasn’t gotten involved,” he adds. “Sales was able to use the tool by themselves really quickly. This is one of the fastest enablements and rampings of new software I’ve ever seen.”

A seamless land and expand motion without more FTEs

Immediately, the Betterworks team felt the impact of Nue’s Lifecycle Manager. “It was a massive opportunity for us,” says Alay in RevOps. “Because before we’d have to ask ‘When did this upsell hit? When did the quantity change from X to Y?’ With Lifecycle Manager, it charts everything out so you can see over time that the ARR went from here to here, on this date, and use that to inform your team.”

Adoption of Nue streamlined Betterwork’s revenue lifecycle management processes along their entire customer journey. It allowed them to run more efficiently and collaboratively—without taking on additional headcount across teams.

“Our Accounting team used to be involved in many customer success related activities: manually creating the real opportunities, and doing the proration calculations as part of upsell. But today Nue does all that for us automatically, so accounting is no longer involved. The customer success team now manages the process end-to-end,” says Raj, who leads Finance.

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“I would estimate that Nue gets my accounting team 20% of their time back.” -Raj Sinkar, VP of Finance.

The ability to administrate internally with Nue’s easy to manage customer experience has also been a huge time saver. “Nue’s interface is really straightforward,” says Alay. “As an admin and operation source, I can just go in and do what I need to do quickly and then go focus on other projects.”

Moving from an ongoing process of calculations and data translation to a completely automated system has been a complete game changer for the CS team as far as tool sophistication. “We started out with a paper and pencil type tool,” says Elise. “With Nue, it feels like we’re working with calculators.”

Easy handoffs with clean ARR numbers from front office to back

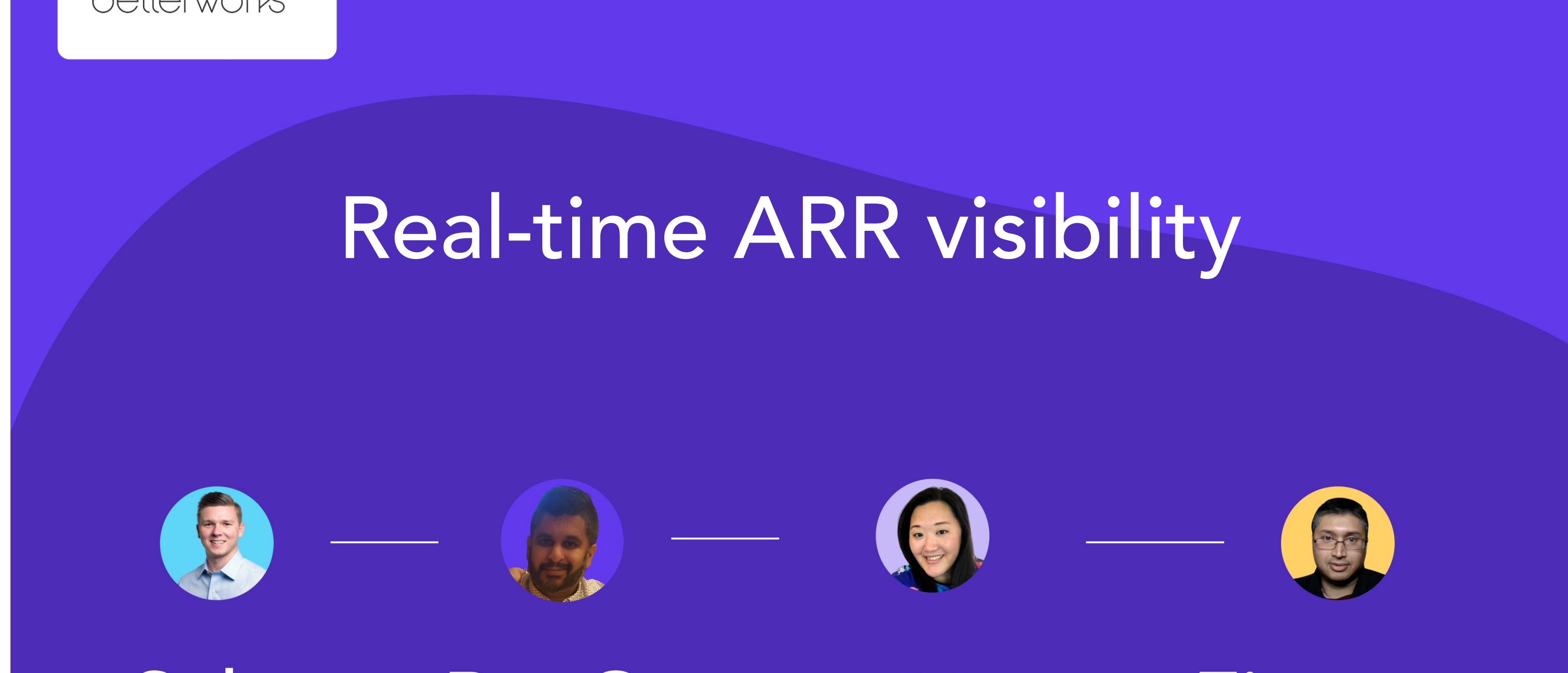
One of the biggest changes to Betterwork’s processes since adopting Nue has been the streamlined handoffs from team to team. Not only does this allow everyone to work together, it ensures that calculations are correct—all the way from initial quoting through to revenue analytics.

“For the first time we can run an accurate ARR report,” says Elise in CS. She cites the importance of the ability to look into the data to understand individual customer journeys.

Alay in RevOps agrees. “Now we’re able to trust that the ARR is correct. The MRR is correct. The way that we have the discounting applied is correct. So Finance is more willing and able to empower other teams. They know everyone’s numbers are good.” These accurate metrics from day one acts as a fail safe against human error in revenue reporting.

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“With everything flowing through Nue, data accuracy is ensured.”



These seamless handoffs provide overall peace of mind for all teams. “Nue makes life easier for all teams that are involved in the quoting process,” says Alay. “From Sales to Finance, to CS, to Legal—everyone is able to trust the data coming in through Salesforce.”