Client Case Study:

From spreadsheets to agile portfolio planning directly in Salesforce

A Client Case Study of how TDC has succeeded in streamlining their portfolio planning. Spreadsheets and Powerpoint presentations are dead and buried, and account managers and leaders navigate solely and entirely from Salesforce.

February 2021

Introduction

In the latter part of 2019, TDC faced some major organizational changes. In order to comply with those changes, along with a desire to implement a more agile way of working across teams, TDC set out to rethink their current portfolio planning setup.

At the time, TDC's setup included lots of offline spreadsheets and Powerpoint presentations that were neither shareable nor comparable, forcing Account Managers to send documents back and forth.

As a solution, and to support their new agile framework, TDC needed tools that were more structured, and so they decided to implement ARPEDIO's White Space Analysis.

The following case study will take you through TDC's journey of transforming their portfolio planning process.

About TDC and this study:

- TDC Group is a Danish telecommunications company dating back to 1879. It is the largest telecommunications company in Denmark.
- TDC Group consists of two independent companies: TDC NET and Nuuday. TDC Net covers mobile and fixed (network) connections, whereas Nuuday focuses on customer experience and entertainment through brands such as YouSee, Telmore, Hiper, and TDC Erhverv.
- The ARPEDIO and TDC collaboration is solely focused around the largest enterprise clients within TDC Erhverv.
- This case study is primarily based on the recollection of Claus Hansen, Business Manager, who has been responsible for implementing Arpedio's tools in TDC as well as internal training sessions with the users. Claus has been a key player in the process of implementing and rolling out the ARPEDIO Solution from the beginning.

The challenges of offline portfolio management

It all started back in December 2019, when TDC and ARPEDIO sat down for their first mutual introduction and TDC presented their way of handling cross- and upselling analyses.

Back then, each team within TDC ran multiple different portfolio planning setups: some were using Excel, others were using PowerPoint, a third group did their analyses in Microsoft Teams, and so forth.

"*As you can imagine, the portfolio plans derived from these different processes were very difficult to compare. And as none of the solutions were integrated with Salesforce, all data would have to be typed in manually afterwards, causing a lot of duplicating effort*", says Claus.

Along with an assessment of their individual pipeline, the account teams across TDC Erhverv would present a subjective prediction of the possible opportunities to their respective managers.

TDC was faced with several challenges due to analyzing and presenting their sales targets this way. In short, their main challenges included:

- Portfolio plans were handled differently and saved on different sorts of drives, and thus not integrated with Salesforce.
- Spreadsheets, PowerPoint presentations and other documents had been created that were not comparable.
- Reporting across portfolio plans was very complex.

Consequently, TDC started looking for a way to optimize their portfolio planning setup, and this is when they began their digital transformation journey in collaboration with ARPEDIO.

Digitizing data and portfolio planning to uncover new opportunities

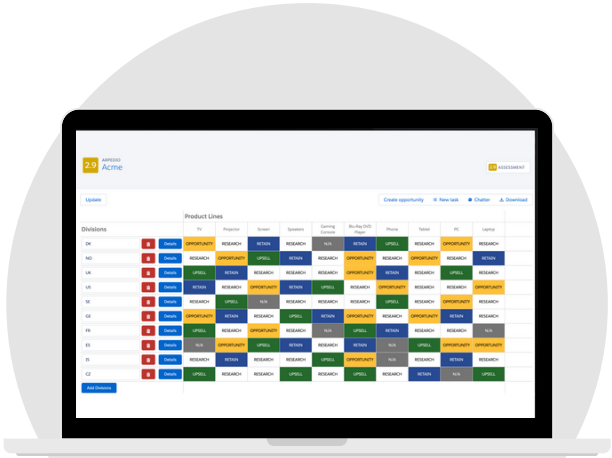
When partnering up with ARPEDIO, TDC was able to digitize their way of planning their portfolios and make their cross- and upselling analyses available to all directly in Salesforce. This was actually one of the main criteria when choosing ARPEDIO's tools: that it was fully integrated with Salesforce, the CRM system already heavily in use in TDC.

"Salesforce is the foundation for everything we do and everything we want to do in the future. Therefore, moving forward from our existing Excel-like setup, we wanted to make sure that the solution we went with was 100 % native to Salesforce to create actual value for our teams and company - for instance by eliminating the extra work of having our teams update customer hierarchies (and data) in two places. And this is exactly what ARPEDIO's plugin helps solve", says Claus.

By implementing ARPEDIO's White Space Analysis, TDC now has one unified and standardized solution for portfolio planning across all their account teams, making all their critical information available to everyone in one place. Account Managers can work on the same analyses simultaneously as everything is updated in real-time.

On top of digitizing their portfolio planning, TDC was suddenly able to create reports across all accounts to determine opportunities for upsell – across product lines, industries, geographies, sales people and account teams. It is even possible to customize these reports to only show the information relevant to the individual.

"*All of the reporting possibilities have been exceptional. It has allowed for our Sales Managers to dive into specific product portfolios to estimate and predict future sales opportunities. Something that we weren't able to do before*", Claus explains.

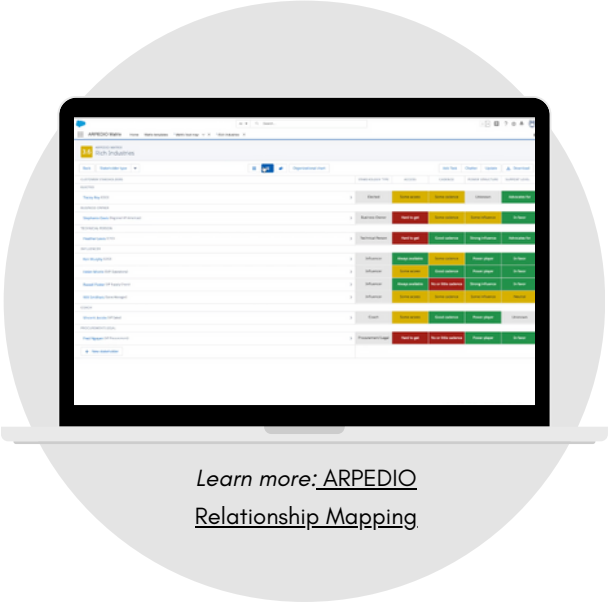


Learn more: ARPEDIO White Space Analysis

Combining ARPEDIO's white space analysis and relationship mapping tool for intelligent deal and account management

Going from identifying what to sell based on the ARPEDIO White Space Analysis to focusing on how to sell it, led TDC and ARPEDIO to expand their collaboration. TDC chose an extra tool from ARPEDIO to support their account managers on their continuing account quest. They added the ARPEDIO Relationship Mapping tool.

"*Where the White Space tool benefits the company at a higher level and provides us with a general and more strategic perspective, the Relationship Mapping tool is focused on the concrete sales opportunity, providing us with the critical information about our stakeholders and where to focus our efforts*", Claus says.



Learn more: ARPEDIO Relationship Mapping

After using the White Space Analysis to identify new sales opportunities (what you can sell to whom), the actual (sales) work starts, i.e., the relationship mapping and relationship building begins. This is exactly what the Relationship Mapping tool is for – the actual sales process. It helps you establish where you might lack relationship coverage by showing who knows whom, and the level of their relationship, ultimately guiding you to figure out whether you have the right level of relationship with the right people (critical decision makers) to help you close the deal.

By providing an instant overview that helps you recognize where to take action, the Relationship Mapping tool has supported TDC in managing and improving their stakeholder relationships, while also making sure that no critical decision maker is overlooked.

Burying Excel with a successful implementation

The implementation of ARPEDIO's tools in TDC was successful. From the beginning it was a requirement from management that all 125 users used this new White Space Analysis tool for their portfolio planning. Management buy-in held together with added-value and the simplicity of the tool has undeniably been key to a successful implementation.

"*Of course people are always skeptical at first. All change is difficult. They want to know 'What's in for me?'. But, luckily our users were fast to see the benefits of the tools. The fact that the tools were immediately creating actual value for our teams and not just another administrative feature made it a smooth implementation process – and thus I'm happy to say that Excel and Powerpoint is dead and buried for good when it comes to portfolio planning here at TDC", says Claus.*

As part of the implementation process, thorough internal training sessions were carried out, and to support all new users with the unfamiliar tools, a little "playbook" in the form of a customized script was developed and handed out to all new users to further train and help them become experts in the new tools.

"*It was a great help during the implementation that ARPEDIO's tools are very intuitive and easy to use. This also made it easy to teach*", says Claus.

In conclusion

A close collaboration between ARPEDIO and TDC has resulted in TDC's portfolio planning becoming 100% digital. Instead of several spreadsheets and PowerPoint presentations, everything is now incorporated directly into Salesforce where TDC already kept their critical client data.

Ever since TDC implemented the ARPEDIO White Space tool back in December 2019, 125 individual users, including Leaders, Account Managers, Consultants, Cloud specialists etc. now do their portfolio planning directly in Salesforce. After approximately 3-4 months TDC had managed to transfer all of their analyses into Salesforce, making sure that everything was up to date and aligned with their portfolio planning process. This has provided TDC with the added bonus of being able to create white space reports across the various business and product lines, along with the ability to compare the various accounts directly across the business.

ARPEDIO's White Space Analysis and Relationship Mapping tools have enabled TDC to perform intelligent deal and account management directly in Salesforce, eliminating duplicated work and improving collaboration by making the portfolio plans shareable and comparable.

Curious to know more? Watch a short demo recording of the White Space Analysis tool and the Relationship Mapping tool. Free of charge.

ARPEDIO

salesforce appexchange 5.0 ★★★★★

Any questions or reflections?

Sara Gynnerstedt
Account Manager

sara@arpedio.com
+45 31 52 94 63
linkedin.com/in/sara-gynnerstedt/