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The Navigator for Enterprise Solutions



Performance Insights

**MOST
PROMISING
SALES TECH
SERVICE
COMPANIES
2021**

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Performance Insights



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The annual listing of 10 companies that are at the forefront of providing Sales Tech services and transforming businesses

Performance Insights

An Intelligent System to Answer All Sales Questions

Improving sales performance is fundamental to every organization, and the financial services sector is no exception. A closer look at the current financial services market reveals that even if CRM is the nucleus of all the sales activities, several other applications are used across the stack to expand the functionality and improve sales. Different departments like sales, marketing, credit, and finance, use a myriad of software applications, and these lead to disconnected systems, multiple versions of the truth, and data silos. The majority of CRM users struggle to integrate their CRM with the other applications across the sales stack. And the lack of automated workflows requires the professionals to manually move data between the systems using spreadsheets, documents, and non-automated report-building techniques. Consequently, these processes are time-consuming, resource intensive, and full of human errors that make the sales stack inefficient, leading to unsatisfactory sales performance.

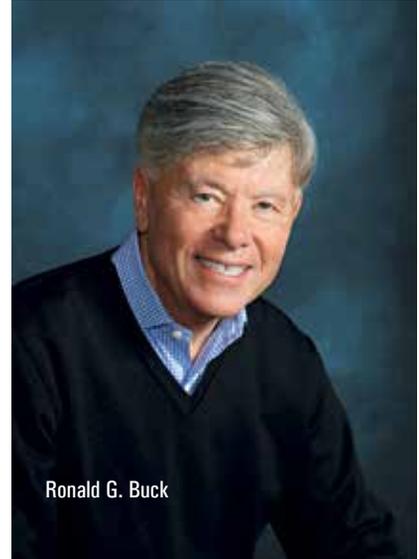
This is where a Scottsdale, Arizona company, Performance Insights, takes center stage, addressing the biggest challenges of CRM within the financial services market through its leading systems integration and workflow automation solution that enhances the organizations' sales performance. Performance Insights offers the best-suitable solutions that resonate with the company leaders who focus on the real day-to-day sales pipeline and operational workflow bottlenecks and inefficiencies.

"We have introduced Performance Navigator that integrates multiple systems, creating a single source of truth (data mart), seamlessly integrates workflows

across the systems, and offers automated reporting from the frontline to the board room," mentions Ron Buck, founder and CEO of Performance Insights.

Performance Navigator works across the entire sales stack and can pull data from any CRM system, loan origination system, document management system, and core processor and operate as one efficient system. It triggers automated workflows to orchestrate the entire workflow across several applications in the sales stack. Performance Navigator also offers complete visibility of the entire sales pipeline with an interactive and intuitive view. It features cascaded reporting for sales, marketing, loan origination incentive compensation and forecasting, among others. Additionally, Performance Navigator helps the sales professionals access and review all the historical and real-time pipeline data on the platform, automates several reports, eliminates spreadsheets, and offers insightful dashboards. It unlocks performance metrics with detailed KPI analytics to enable clients to observe how the teams are working in sync.

Performance Insights works with all CRM systems, and notably, it is the largest reseller of Pipedrive in the world, a leading CRM, with a total focus on financial services. To bring out a successful implementation scenario in streamlining the sales performance, Buck mentions the story of Umpqua Bank, one of the most prestigious banks in America. The bank uses Pipedrive and Performance Navigator across ten different bank divisions that help them to build custom data extracts, reports, and analytics and resolve their issues of disparate systems and silos.



Ronald G. Buck

What has facilitated Performance Insights to outshine its market contemporaries is its strategy of verticalization that focuses solely on financial services (banking, mortgage, insurance, financial advisory, etc.). Unlike many others, who have a horizontal strategy, the company is able to offer edging services to their clients, adding value to their workflows and transforming businesses beyond technological interventions.

Performance Insights' proven track record of their comprehensive solutions has helped them serve several financial institutions across the globe in the US, California, UK, and EU. Striding ahead into the future, they are keen on expanding and growing with industry segment strategic partnerships. Over the years, with its prolific expertise, Performance Insights has been triumphant in guiding financial institutions to leverage their applications and achieve next-level sales performance. "With our narrow focus on financial services, each client engagement is a learning experience for our entire customer base," ends the CEO. **CR**