

# CASE STUDY

## Ascendant

Industry: **Fintech**



## Why Ascendant FX Chose Prialto

As the Vice President of Enterprise Solutions at Ascendant, Rob Graham is responsible for supporting sales operations. The sales team was hindered by the amount of admin work—data analysis, email outreach, scheduling meetings, and reporting—eating up hours every day. Recruiting, interviewing, hiring, training, and managing support staff would be time consuming and require more HR and management resources. Ascendant turned to Prialto to offload those tasks. Prialto hires, trains, and manages the staff and has experience supporting sales organizations all over the U.S. After starting with a small pilot project, Ascendant now leverages 12 Prialto Productivity Assistants (PA) supporting the sales team and other executives in the company.



**The goal:** Growing top-line revenue. Ascendant wanted to free its sales team to spend more time selling without adding additional management and HR overhead.

## ABOUT ASCENDANT

Ascendant is a leading global payments provider, focused on the B2B cross-border payments space. Ascendant is headquartered in Toronto Canada, with offices in the US and UK, partnering with over 2,000 financial institutions.



There are only so many hours in a day, and our sales team needs as much time as they can to seek opportunities. The Prialto assistants do a fantastic job—having them handle the top of the funnel is huge.

Rob Graham, Vice President of Enterprise Solutions, Ascendant



# PROJECTS

Prialto PAs support Ascendant's sales team with data analysis, list building, CRM data entry and management, lead follow-up, and appointment setting. They also generate and run reports for each salesperson that go to the COO.

"These tasks are an important part of the sales process but can be tedious and time-consuming," Rob said. "The Prialto assistants allow our sales executives to focus on growth."

"We started with a few PAs. After seeing the value, the relationship expanded to assign one to every salesperson, and they love the service," Rob said. "Best of all, they don't require any hand-holding by me or anyone else. We just tell them what we need, and they get it done."

Rob works directly with Prialto's Engagement Manager. When they identify a new task to offload, the Engagement Manager and Prialto's managers train PAs on the new process. "So much happens in the background that I don't need to worry about," Rob said.



## 1. Data Analysis



## 2. Outreach



## 3. Reporting



## 4. Data Management





## Data Analysis

Prialto PAs take Ascendant's buyer persona data and search contact databases like ZoomInfo and LinkedIn Sales Navigator to find prospective buyers and hand them off to the sales team.

"They do such a fantastic job finding qualified prospects," Rob said. "We can track the number of closed opportunities to the PAs prospecting."



## Outreach

Building email lists, launching campaigns, and tracking results are time-consuming. Prialto PAs take those tasks off the sales team's plates.



## Reporting

Prialto assistants pull regular reports from the CRM and other sources, format them in templates and deliver them to the sales team and executives.

"The assistant for my team combines three reports for me to send to my COO every week," Rob said. "I was sick one week and came back and the report had been taken care of. I love the initiative."



## Data Management

There are also one-off projects where there is no process in place because it is new.

"We had a summary of all of our sales activities that we wanted to distribute to the team with only each individual's data," Rob said. "Our assistants took the data and created separate reports without little direction from us."

# RESULTS

In addition to providing sales support, assistants handle scheduling, travel planning, and expense reports for Ascendant executives.

“What I love about the service is that it is seamless and requires very little management,” Rob said. “The onboarding was effortless, backup PAs for continuity—Prialto has thought of everything.”

“The Prialto assistants are part of our team,” Rob said.



## 12 Executives

Prialto provides support to 12 Ascendant executives.



## 660 Hours Saved

660 hours per month saved on sales and admin tasks.

