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01

Management

02



03



04



## Management

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PMG SPNUI MOUTEUTIHUN  
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ISMUPTTTUOUTPPSEOUUMMv

## Expense Management



Busy schedules left many salespeople and executives struggling to keep up with expense reporting. “It got to a point where I had to ask my wife to help me with my expense reports because it was just too much for me to do,” says Morton. “Now, I just flip a quick note to my Prialto assistant Mary Ann, and she takes care of it.”

## Travel Management

The planning involved with frequent travel ate up way too much time that could have been spent closing business. “I was spending too much time making travel arrangements, comparing hotels and flights, and booking everything. Now, I just give parameters to my assistant. She knows what airlines I fly, airports to use, and my hotel preferences, so she can book my travel without much input on my part,” says Morton.






## Salesforce Management



Prialto assistants also play the role of a sales assistant. They drive research, list building, campaigns, Salesforce data management and reporting, ensuring contacts are up-to-date, cleaning up inaccuracies, creating new contacts and opportunities, event support, and even relationship management. “We can rely on our Prialto assistants’ expertise in Salesforce. We’re confident that they know what they’re doing and it takes the burden off of the sales team,” says Jeff Fenigstein, head of marketing and sales operations, adding that he credits Prialto with helping them maximize their investment in Salesforce.






# Keys to Success

Woodruff Sawyer is succeeding with Prialto because its stakeholders have committed to these best practices:

-  Provide clear guidelines of their processes and expectations to the assistant and the Prialto engagement manager
-  Both teams regularly meet to review progress and to continuously optimize service
-  Focus on getting the basics dialed in before offloading processes which may require more judgement and nuance from their assistants



# Results

-  Within 18 months, the company tapped the talent of 19 Prialto assistants, supporting sales and operations executives across the U.S.
-  Prialto assistants provide more than one thousand hours of “productive time” each month back to the firm’s top producers, allowing them to focus more on clients, prospects and the business.
-  Prialto helps the Woodruff Sawyer producers and the ops teams maximize their investment in Salesforce by inputting all data / interactions based on company standards and keeping reports up-to-date.
-  All expense reports are now accurate and submitted on a timely basis since busy producers and executives no longer have to worry about them.
-  Executives leverage their assistants for many admin and sales support tasks, such as inbox management, prospect research, note taking, social media, and helping them become more efficient and organized.

15

Executives

Prialto provides support to 15 Graham executives.

1,200+

Target Accounts

1,200+ target accounts updated in the first two months.

600

Hours Saved

600 hours per month saved on sales and admin tasks.

## Prialto Amplifies Your Team



### Time

Spend more time in more valuable ways. **Increase Sales Conversations**



### Intelligence

Leverage data to target prospects and nurture relationships. **Optimize reports and information for better decision-making**



### Spirit

Make travel & time more impactful. Provide freedom from late nights tabulating expenses. **Support work life balance**



### Sales Process

Deliver Fortune 500 execution at SMB prices. Leverage CRM expertise and best practices. **Provide ongoing training and drive adoption**



### Management Execution

Drive organizational and process consistency as appropriate. **Measure effectiveness**



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