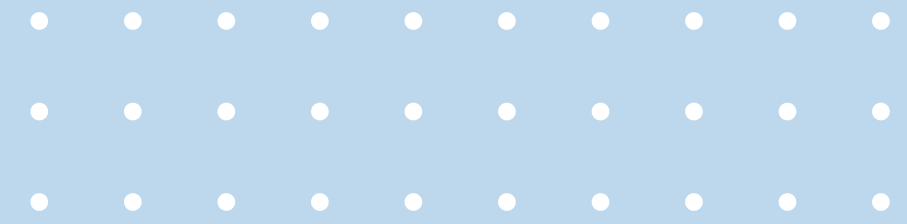


pivottry co.



BREAKING DOWN SILOS

Scaling Smart

www.PivotryCo.com



CLIENT OVERVIEW

MenuMetric, a fast-growing SaaS provider of F&I menu software, supports dealerships.

As the company prepared to double its client base, siloed internal teams and inefficiencies in sales and operations posed a significant risk to scalability and customer retention.



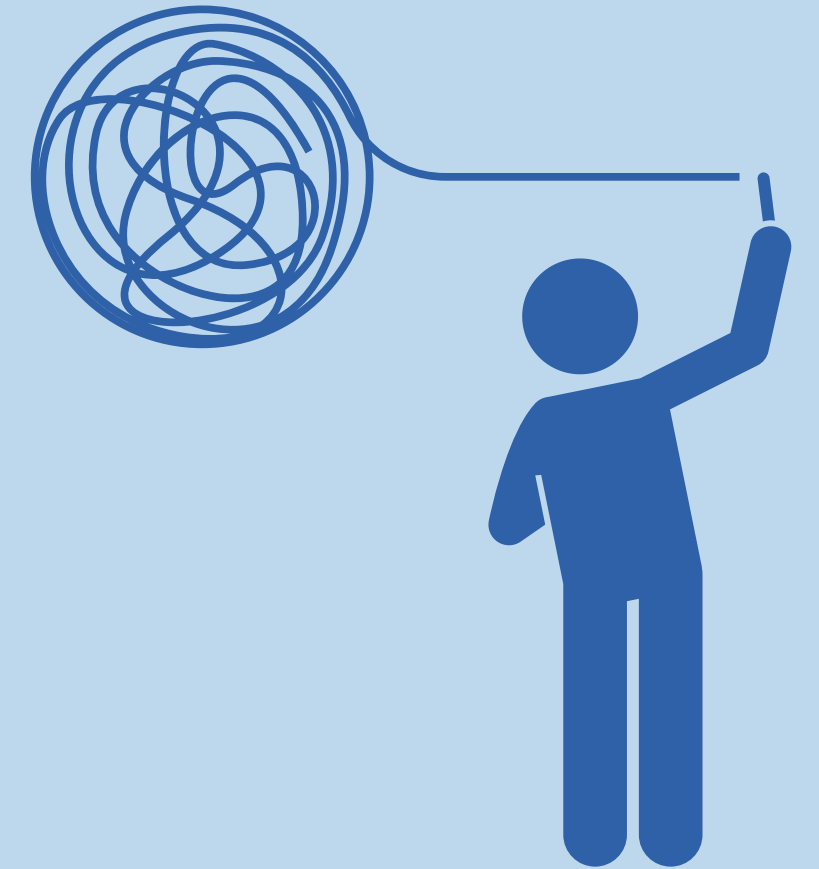


Rapid Expansion Opportunities

- Sales Strategy Gaps. Over-reliance on inbound leads with underdeveloped outbound and partner-driven strategies.
- Cross-Department Disconnection: Siloed teams delayed product updates and weakened support.
- Underutilization of Data: Missed upsell opportunities as many dealers underused the platform.



Without addressing these issues, MenuMetric risked stagnation, increased churn, and slowed revenue growth.



THE PROBLEM

THE SOLUTION



Sales Audit

Team Alignment:

Fostered communication between Sales, Training, Support, and Development through structured feedback loops.



Training

Proactive Sales Strategy:

Shifted sales focus from reactive inbound leads to structured outbound prospecting and partner engagement.



Execution

Data-Driven Decision Making:

Leveraged CRM and platform analytics to enhance dealer engagement, retention, and upselling.

TEAM ALIGNMENT

Encouraged more cross-department collaboration and training for improved problem solving.

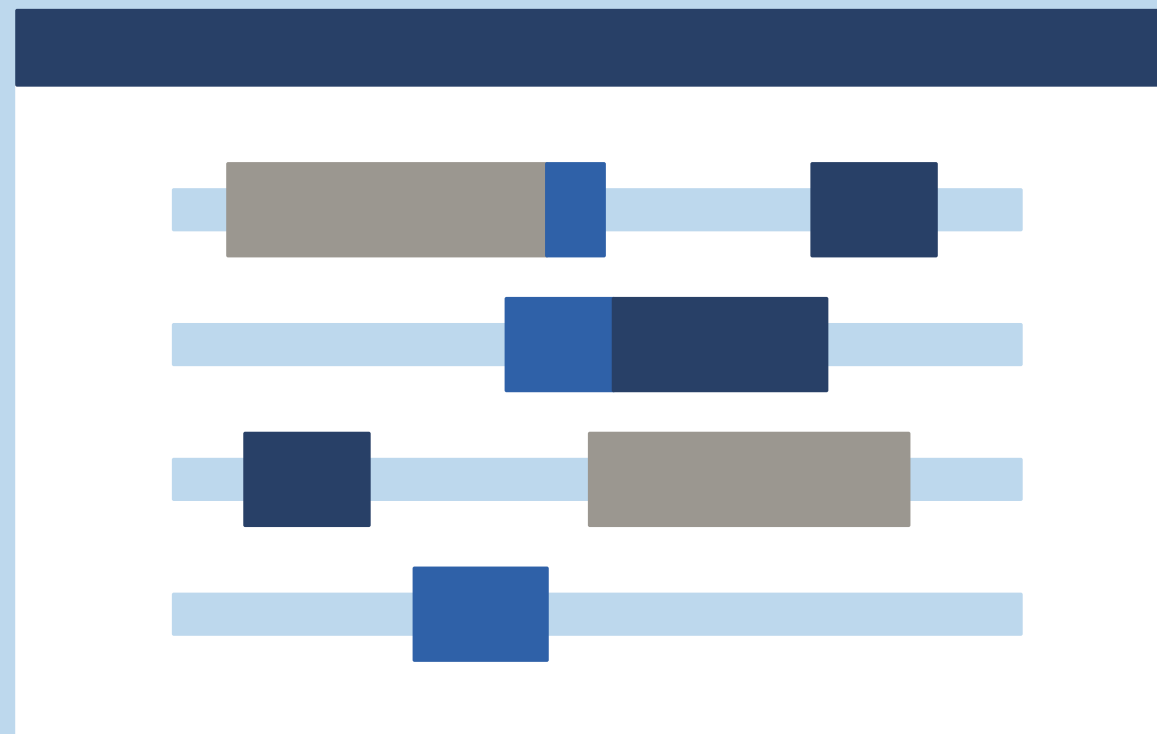
BUSINESS REVIEWS

Identified opportunities for quarterly business reviews to engage and consult customers.

MESSAGING

Coordinate Sales and Marketing to enhance the narrative and needs of company sales growth.

PROCESS MAPPING

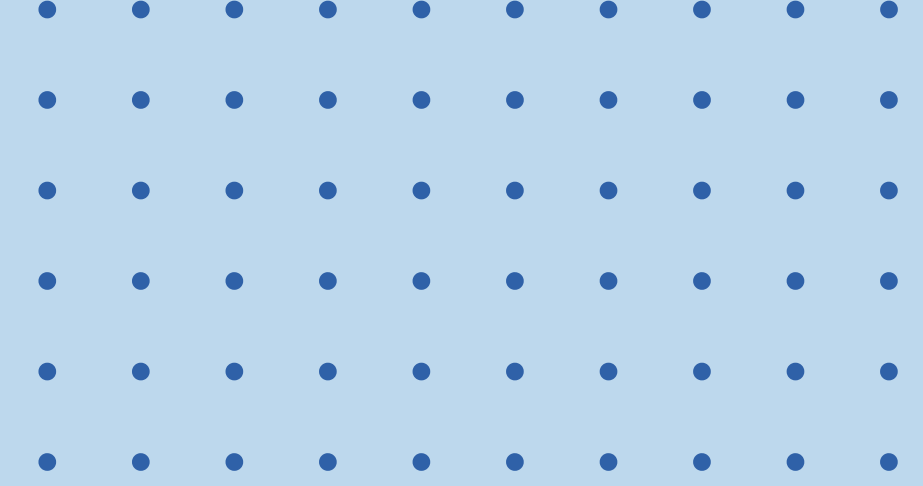


50%
improvement
in setup time

60%
customer
retention

70%
enhanced
campaign impact

TRAINING

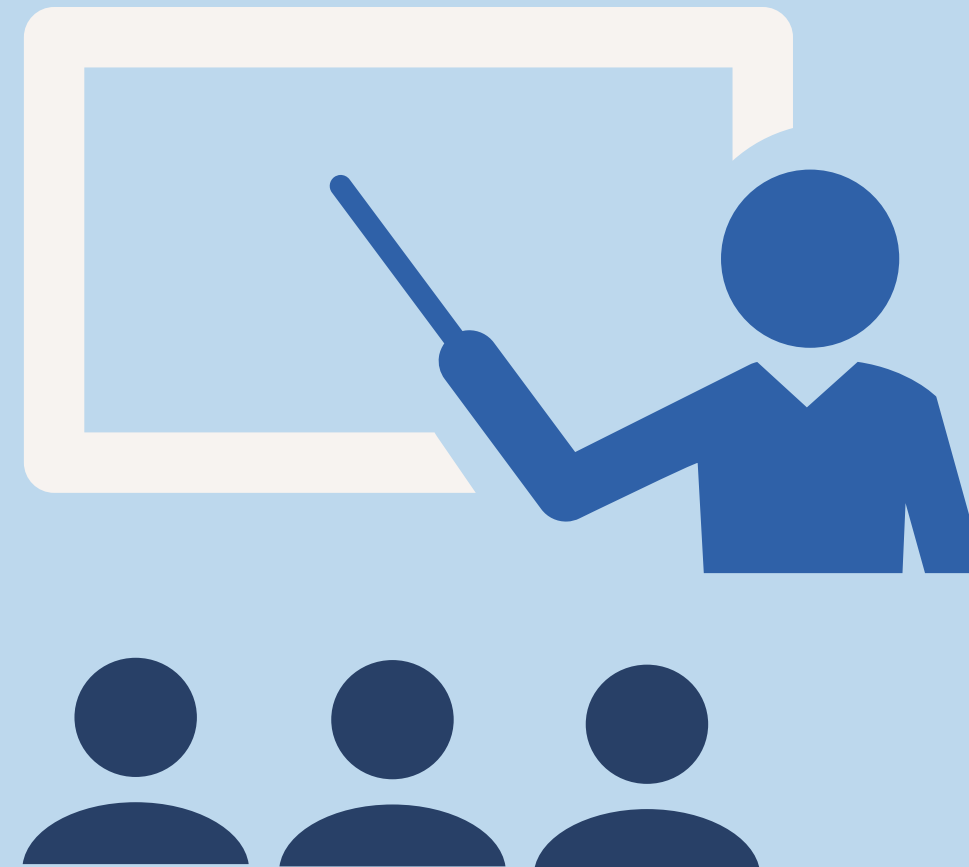


TEAM BUILDING

Facilitated team-building events to strengthen cross-department relationships, enhance communication, and promote collaborative problem-solving through interactive sessions and open discussions.

CUSTOMER INCLUSION

Engaged key customers through quarterly reviews, leveraging data insights to address system issues, enhance satisfaction, and identify growth opportunities for mutual business success.



LEADERSHIP DEVELOPMENT

Guided new leaders to broaden perspectives, utilize data for informed decisions, structure meetings effectively, and encourage inclusive discussions to drive better outcomes..

SALES PROGRAM

Equipped the sales team with fresh messaging, out of the box sales approaches, and tools to enhance engagement, highlighting benefits, and improving selling strategies.

RESULTS

FASTER

Faster issue resolution with improved cross-department communications.

65%

ENGAGEMENT

Improved partner engagement when sharing KPI's relating to their business success.

60%

ENHANCED

Marketing effectiveness by 70% through aligned sales and marketing messaging, advancing sales objectives and enhancing campaigns.

70%

WHY CLIENTS CHOOSE PIVOTRY CO.

Scaling a SaaS company requires more than client acquisition—it demands strong internal alignment, a proactive sales approach, and data-driven decision-making.

We help companies transform operational inefficiencies into growth opportunities.

Ready to optimize your sales strategy? Let's chat.

Sarah Dippen

CEO | Principle Sales Consultant

