

Case studies

Deal recovery



Eliminated manual deal reviews & speed up sales team enablement

Challenge

Patch Retention faced challenges with manual processes in analyzing closed deals, leading to inefficiencies and delayed sales training insights. The team struggled with a "wall of text" when trying to understand deal outcomes, which hindered their ability to quickly extract actionable insights.

AskElephant solution

They utilized AskElephant's integration with HubSpot to automate the analysis of closed deals directly within Slack. This setup allowed for streamlined workflows where deal records marked as closed won or closed lost were automatically analyzed and shared, reducing the need for manual data handling.

AskElephant result

By automating closed deal analysis, Patch Retention significantly reduced manual effort, enabling sales teams to gain faster insights for training purposes. The integration provided clarity and efficiency, allowing the team to focus more on strategic initiatives rather than data processing.