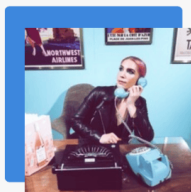


CHEQ customer case

“Great tool and great customer service!”



“Throughout our process, including a lot of customizations, the team at GetAccept was there to guide us and really went above and beyond to get us up and running.”

Meghan LaMountain
Global Sales Enablement Manager
Cheq

Cheq needed a solution to unite a growing sales team

Cheq, a SaaS platform that provides security for marketing data and analytics, was looking for that perfect missing piece in its sales tech stack. Cheq needed a sales solution to help manage and motivate a growing sales team across time zones.

For Meghan LaMountain, global sales enablement manager at Cheq, the ideal solution was a digital sales tool that helped regional executives maintain data integrity by integrating with their source of truth – Salesforce. She needed a single sales ecosystem where the specific sales tools work seamlessly together to produce accurate data. Overall, the Cheq team was looking for a more intuitive tool that integrates with their CRM and makes lives easier for their Account Executives.

The solution

Cheq's sales team made the switch to GetAccept. Account executives, Cheq's primary users, now use GetAccept every week to send important documents like NDAs and sales proposals with their service-based pricing. Cheq uses different combinations of the GetAccept product to make sure proposal info pulls automatically and still looks beautiful.

GetAccept didn't just help Cheq's sales team, though. Analytics and insights in the GetAccept platform help team leaders understand how buyers engage with Cheq's sales content. These insights help sales leaders and account executives tailor their messaging to buyers' expectations. Video analytics were particularly helpful, as the team moved towards using personalized videos in their sales process with GetAccept.

GetAccept's chat feature also helped sales reps communicate with their buyer and make changes in real-time.

Above all, Cheq is able to use GetAccept within their existing Salesforce environment to streamline their sales cycles without adding extra admin work for their Account Executives. Merge fields help the team ensure accuracy between GetAccept and Salesforce data, and content folders help leaders keep everything organized.

The result

With GetAccept's comprehensive digital sales solution, Cheq's Account Executives go beyond just a simple contract send-out. The sales team is able to pull all of the most important buyer information from Salesforce into GetAccept to maximize efficiency.

GetAccept has also benefitted Cheq's clients. Account Executives appreciate that clients can edit their information and have that information updated across multiple channels and systems.

GetAccept and Cheq continue to work closely on creating a more customized experience for the team, including the implementation of merge fields and folders to keep everything organized. The Cheq team leverages GetAccept's dedicated customer success team to implement the tool and increase teamwide adoption.

Overall, GetAccept will be a scalable option for the Cheq team, with an eventual rollout to their own customer success team and other teams that need to send and sign documents.

CHEQ

Quick facts

Industry: Cybersecurity

Favorite functions

- Salesforce integration
- GetAccept's dashboard analytics and insights
- In-app editor
- Personal video creation

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Meghan LaMountain
Global Sales Enablement Manager @ Cheq
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