

## Background

Ullink is a London-based, global multi-asset trading technology software provider. They help those buying and selling connect and execute millions of trades, each day. We worked with them to improve their sales planning and pipeline management processes, across the organisation.

## The problem

When we invested in Ullink in 2014, they did not have globally consistent sales and CRM systems in place. They relied on resource-intensive, manual reporting. This made it hard to understand the best ways to grow the business, as well as how to develop realistic, relevant budgets and strategies. Most importantly, the lack of centralised, company-wide sales pipeline made it hard to understand the different stages of their sales process. Sales pipelines were locally based, lacking global consistency and qualification measures.

There was no 'view and review' process attached and, as a result, Ullink was struggling to have a 'future-looking' sales process, with understanding of conversion rates, profit and projections.

## The solution

Since our investment, Ullink has launched a number of initiatives to help implement systems that tackle this fundamental problem. Working together we have put in place clear, standardised sales planning and pipeline management processes, across the organisation.

A new, global, Head of Sales Operations was hired. Then we worked with the board and executive team to ensure this important role was fully supported. Next, training sessions were organised for the global sales team, to ensure that the CRM system was used regularly and accurately.

Finally, detailed weekly and monthly dashboards were set up for each Sales MD, so they could see performance and pipeline. Ullink also established, a weekly, global programme of meetings, with different members of the team, to discuss pipeline, forecasts and business health.

The measures we have implemented, together, have enabled Ullink to track sales activity, ensure this is visible to the whole organisation, and to identify opportunities for growth early on. In addition to generating an annual, double-digit growth in sales, Ullink has been able to develop an organisation-wide culture of better future planning, setting up a strong foundation for continued future growth.

