

SUCCESS STORY



# TecEx Eliminates 40 Work Weeks of Wasted Rep Effort with Playbooks

## The Background

TecEx is the global leader in importing technology equipment. They offer Importer of Record and customs compliance services that give clients a hassle-free, cost-effective pathway to navigate cross-border transactions.

They have 70 BDR's globally responsible for engaging new prospects and building qualified pipelines.

## The Problem

BDRs used to waste valuable selling time on manual administrative tasks and in working outside the CRM. System and process limitations created behaviors that corrupted CRM data integrity and made it difficult for leaders to measure performance.

## The Objective

Improve prospecting performance and sales effectiveness by maturing from unmeasurable, random acts of selling to a guided and structured machine with better consistency and insights.

## The Solution

They kicked off a change management initiative to establish a foundation for scaling the business.

In planning, they did the heavy lifting of building over 100 sales workflows, or Plays, each with a variety of rules for automating tasks, triggering actions and capturing data.

They rolled out Playbooks regionally across all 70 BDRs over an aggressive 2 month period, with both Operations and Sales leadership sponsoring the project, and adopted a managed reporting package in Salesforce fed by Playbooks.

“ Playbooks has really added value with new reps. We see instantly whether they actually understand the industry we’re in. The insights and the structure have propelled us forward. ”



**Jacques Booyesen**  
Director of Sales  
Operations



“As a partner, XANT has helped us be more effective leaders, operators and sellers. On a product level, Playbooks has helped us improve the quality of our prospecting and given us a measurable lift in close rates.”



**Mike Pepper**  
Director of Global Sales



## The Results

They found immediate value in performance insights and in the structure which Automation Robots gave to reps.

According to TecEx's Sales Operations Director - Jacques Booyesen, Automation alone saved them one hour per day per rep, or 80 additional hours per day, equivalent to two additional full-time reps. They also gained rep capacity to respond more quickly to quality leads.

Teams now operate exclusively from their CRM + Playbooks instance, creating more accurate data insights in managed CRM reports for leaders, and improving the productivity and close effectiveness of reps.

## TecEx Transformation

### Before

Emails not tracked effectively

Poor integration with/ adoption of SFDC

Inconsistent reporting on activities

Reliance on email as primary communication

Productivity too low

Excel is 'system of record'

### After

Full email visibility: sends, opens, replies, and bounces

Playbooks automatically updates SFDC

Clear, frequent reporting

Outbound dials increased by 2170%

Total activities increased 55%

Playbooks drives SFDC as system of record

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## The Numbers

**14%**

increase in hours spent prospecting

**2170%**

increase in outbound dials

**1600**

rep hours per month saved

**100+**

automation workflows created

