

Experience Impact

What can your sales team accomplish with managed sales support?



Member Spotlight

"I initially expected the service to take substantial up-front time from me to get it working. But Prialto's service culture and processes made it impressively turnkey."

- Seth Cohen, RVP

COMPANY NAME: Castlight Health

JOINED PRIALTO: October 2013



Prialto Amplification



100%

Prialto helps Castlight's team create and submit expense reports 100% on time



7 UNITS

Castlight deploys 7 [Prialto Units](#) for complete Sales Ops support



350 HRS

Prialto creates over 350 hours each month for Castlight's team

Support for Core Sales Management Teams



Castlight Health is changing the way people buy healthcare. With their online tool, employees of Castlight clients can easily see the cost and quality of a medical provider before getting treatment.

Like other fast-growth companies, Castlight had not set aside the time, expertise, or resources needed to build an administrative layer. When Castlight's head of sales operations first met with Prialto, only a couple of their highest-level execs – in a company of 200 – had direct support from an executive assistant. Offsite regional sales vice presidents (RVPs) from Charlotte to Portland were managing teams of up to a dozen reps while also juggling basic administrative tasks such as their expense forms.

Cost-Effective Support for Key Executives

In 2013, Castlight engaged Prialto to create and manage an administrative support team for its RVPs. After surveying the Castlight team, Prialto customized an implementation plan that fit each RVP's workflow. Each RVP's productivity team (which includes a Prialto engagement manager, productivity assistant and team leader) coached him on easily adopted time-management and delegation techniques. This cleared the way for RVPs to quickly offload:

- Scheduling
- Expense Management
- Travel Management
- CRM Updates

Prialto's onboarding process allowed each RVP to quickly hit the ground running. Within weeks, the Castlight executives were spending more time working directly with their teams to drive growth than on administrative minutiae.

Enhanced Visibility

With Prialto PAs managing their CRM platform, Castlight's sales managers have increased visibility into their pipeline and workflows. RVPs don't lose critical meetings, since PAs seamlessly take over email Ping-Pong and relentlessly follow up to ensure the right people are scheduled at the right time. CRM data is easy to access, updated in real time and can quickly be sorted into relevant reports and dashboards. Expenses are filed on time, ensuring correct accounting, timely reimbursement, and peace of mind. Travel logistics are taken care of in a way that minimizes hassle, meets company guidelines, and deals with the cascading effects of any scheduling changes.

Enforcing Best Practices

In addition to directly supporting each Castlight executive, Prialto's productivity teams collaborate internally to identify, document and share best practices. That means that valuable processes implemented for one Castlight executive can be quickly replicated for colleagues across the team. This knowledge-sharing exercise ensures consistency across Castlight's sales team, while allowing Prialto to build new policies and remedy existing workflow inefficiencies for Castlight.

Support They Appreciate

Each RVP's Prialto assistant is focused on making the executive's life easier, so that RVPs can spend more time selling and managing their teams to success, and less time managing logistics. Prialto PAs help their executives make the most of every business trip and every business day by booking travel, scheduling key meetings, tracking expenses, and collecting weekly updates from direct reports. This means that critical administrative work gets done to move their business forward instead of getting in the way.

Prialto can amplify your team

- **TIME:** Increase Sales Conversations
- **INTELLIGENCE:** Leverage data to target prospects and nurture relationships. Optimize reports for decision making
- **SPIRIT:** Make travel time more impactful. Provide freedom from late nights tabulating expenses. Support work life balance
- **SALES PROCESS:** Deliver fortune 500 execution at SMB prices. Leverage CRM expertise and best practices. Provide ongoing training and drive adoption
- **MANAGEMENT EXECUTION:** Deliver quality data for better decisions. Enforce consistent follow through. Measure effectiveness



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www.prialto.com