



Case Study

Expensify Uncovers Actionable, Quantifiable Sales Insights with Base

Base helps businesses take a scientific approach to sales with an all-in-one platform that drives adoption, big data analysis and actionable insights that accelerate performance.

Company Size 51-200	Industry Financial Services
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Location San Francisco	Founded in 2008
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Founded in 2008, Expensify is a San Francisco-based financial services company that provides an online expense management service for customers worldwide. Given the market need for a better expense reporting solution, Expensify has been experiencing massive growth in product adoption, revenue and headcount. In fact, based on 2014 revenue, Expensify was recognized as the fastest growing ERP software in the world. In light of this growth, Jason Mills, Head of Sales at Expensify, was tasked with building the Expensify sales team from the ground-up—but that’s only where his work began.

Challenge

As Jason continued to evolve his team, he began looking for a more data-driven solution with the capacity to make sense of today’s volume and variety of data. Specifically, Jason needed to better understand rep capacity, channels for upmarket growth and marketing source attribution, and how these factors worked together to drive sales performance. “I was searching for a solution that would provide deeper, more accurate insights to guide our growth strategy in a measurable and scalable way,” says Jason.

Solution

Thanks to thousands of hours spent researching the key factors of sales growth, Base’s new scientific sales platform, Apollo, is revolutionizing the way that businesses like Expensify analyze and improve sales. Using advanced big data architecture, predictive analytics and machine learning algorithms, Apollo is able to evaluate data accuracy and surface untapped opportunities in the sales process. Apollo dynamically configures each company’s unique Sales Genome, a complete codification of hundreds of factors impacting sales performance. It then leverages the Sales Genome across key conversion points using a proven and consistent formula to uncover actionable, quantifiable sales insights.

“The insights we’re getting from Base are golden not just to me & my team, but also to executives across the organization & our board members.”

—Jason Mills, Head of Sales, Expensify

Pleased with his team’s adoption of Base’s core sales productivity platform, Jason decided to expand their relationship by being one of the first customers to adopt Apollo. At that point, Base had gathered more than 15 million data points around Expensify’s sales activities. It immediately became clear that there were great opportunities for improvement in the Expensify sales process. Specifically, a large segment of lead sources had tracking issues, making it difficult to visualize which marketing channels were driving Expensify’s record growth. A business initiative was created to resolve this issue and, with help from the Base Sales Science Team and Apollo, Expensify is now able to understand which sales reps have the most success closing deals from particular lead sources, resulting in more strategic lead distribution.

Results

Reflecting on where Expensify is following its early experiences with Base and Apollo, Jason is excited about what lies ahead. “Apollo has given us visibility into our sales process and performance that otherwise would have been extremely difficult, if not impossible, to achieve,” says Jason. The key to sales growth is the ability to generate actionable and quantifiable insights, and Base is delivering these results. “The insights we’re getting from Base are golden not just to me and my team, but also to executives across the organization and our board members,” boasts Jason. “We look forward to working closely with Base to further refine our sales processes in a measurable and scalable way!”

About Base

Base built the first scientific sales platform that empowers businesses to grow revenue in a way that’s measurable, repeatable and scalable. Unlike legacy cloud CRM and sales force automation systems, Base offers an all-in-one solution that increases rep adoption rates and data capture across devices. With the ability to analyze big data trends in real-time, Base provides sales leaders with the actionable, quantifiable insights they need to accelerate performance.