



CASE STUDY

THE FUTURE OF SALES IS AI

How a Large IT Consultancy Revolutionized its Go-to-Market Strategy & Boosted Revenue Through AI-Driven Sales Intelligence

Overview

A global technology consulting firm headquartered in the U.S., was needing to evolve from an IT services provider to a comprehensive data analytics powerhouse, it offers a broad range of services spanning business intelligence, cloud modernization, AI implementation, and infrastructure support. Under the stable leadership of its CEO, the company has strategically expanded its global footprint with offices across the United States, Europe, Australia, and Singapore.

When the new Sales Director joined, he faced a critical inflection point. The company was undergoing significant transformation, expanding beyond its traditional offerings into AI capabilities, embedded analytics, and data monetization solutions. Despite strong partnerships with technology leaders like Tableau, Snowflake, and AWS, it needed to radically shift from its successful inbound, brand-driven sales model to a proactive outbound approach. By implementing ShiftUp—a Salesforce-integrated GTM intelligence solution available on the AppExchange—it orchestrated a complete transformation of the sales organization. ShiftUp reversed the typical CRM paradigm; instead of sellers working for the CRM, the AI-powered platform put Salesforce to work for the sellers, delivering real-time intelligent insights on territories, accounts, opportunities, and conversations. The result was the company had its most successful sales quarter ever—demonstrating how AI-orchestrated GTM workflows can fundamentally reinvent a company's go-to-market strategy.



With thousands of accounts and limited seller capacity, we needed technology that could do more than simply automate tasks. We needed intelligent systems that could connect our workflows and keep our sellers focused on execution."

— Sales Director, Americas

The Challenge: Pivoting from Service-Led to Sales-Led Growth

The Company had built its reputation through Tableau-centric, lead-heavy sales models where technical expertise drove customer acquisition. As the company expanded its service portfolio to include AI readiness assessments, cloud modernization, data monetization, and embedded analytics solutions, they encountered several critical challenges:

- **Territory Complexity and Prioritization** — Sellers suddenly faced territories with hundreds of accounts, with no clear way to determine which opportunities deserved focus.
- **Stakeholder Identification Gaps** — With new strategic offerings came the need to engage C-level executives rather than technical buyers, requiring completely different relationship-building skills.
- **Consultative Selling Evolution Needed** — Teams needed to transform from reactive technical experts into proactive business consultants guiding customers through complex buying journeys.
- **Account Intelligence Bottlenecks** — Sellers spent days manually researching accounts, only to find their intelligence quickly became outdated as market conditions changed.

Recognizing these challenges as barriers to the next growth phase, the Sales Director championed this transformation with ShiftUp's AI-orchestrated GTM workflows that could scale across their entire customer base and empowered sellers with the intelligence they needed to succeed in this new selling environment.



The Solution: AI-Orchestrated GTM Workflows with ShiftUp

By implementing ShiftUp's Salesforce-integrated intelligence platform, the company fundamentally transformed their go-to-market execution:

- **Intelligent Account Prioritization** — Rather than manually analyzing thousands of accounts, ShiftUp automatically surfaced the highest-value opportunities across the entire customer base, ensuring sellers focused only on accounts with genuine potential.
- **Strategic Stakeholder Mapping** — The platform identified the right C-level executives to engage and recommended personalized outreach strategies that resonated with their specific business challenges.
- **Guided Consultative Selling** — ShiftUp provided conversation frameworks that transformed technical specialists into business consultants, equipping them with messaging that repositioned the company and influenced customer thinking.
- **Dynamic Execution Intelligence** — Instead of static, quickly outdated account plans, sellers received real-time insights and next-step recommendations that evolved as customer conditions changed.

These orchestrated workflows operated seamlessly within Salesforce, flipping the traditional CRM paradigm so that the system worked for the sellers rather than sellers working for the system.

The Results: AI-Driven Sales Acceleration

1. **Best Quarter Ever:** immediately following ShiftUp's implementation, validating the strategic pivot from inbound to outbound sales motion.
2. **Elevated Seller Productivity:** enabling the team to scale meaningful customer engagements across a more diverse client base — delivering strategic value and maintaining high-touch service quality without proportionally increasing headcount.
3. **Improved Alignment with New GTM Strategy:** resulting in stronger pipeline performance and increased awareness of the company's expanded service offerings.



The Future of AI in Sales: Competitive Advantages

The company sees AI revolutionizing how go-to-market teams operate. "The real power isn't just automating research—it's orchestrating the entire GTM workflow at scale," the sales director said. "With thousands of accounts and limited seller capacity, we needed technology that could do more than simply automate tasks. We needed intelligent systems that could connect our workflows and keep our sellers focused on execution."

The greatest impact comes from AI's ability to transform the seller-CRM relationship.



Before ShiftUp, our sellers were working for the CRM, manually inputting data with little value in return. Now, Salesforce works for our sellers, delivering actionable intelligence that guides them through the entire customer journey—from which accounts to prioritize, which stakeholders to engage, to how to position our expanded capabilities."

By partnering with ShiftUp, the company didn't just adopt AI—it fundamentally transformed how its go-to-market organization operates, proving that AI-orchestrated GTM workflows are essential for success in today's rapidly evolving technology landscape.



Ready to orchestrate your go-to-market transformation with AI?

Connect with ShiftUp today at sales@shiftupai.com to discuss how AI-driven GTM workflows can deliver your best quarter ever.

Follow ShiftUp on LinkedIn for insights on the future of AI-powered sales:
[linkedin.com/company/shiftupai](https://www.linkedin.com/company/shiftupai)