

TaskUs registered a 30% increase in up-selling & 20% increase in cross-selling with DemandFarm



Data-driven account clarity and **Key Account Management** that accelerates targeted growth

A Quick Look

TaskUs is a provider of outsourced digital services and next-generation customer experience to several innovative and disruptive technology companies. The new and improved system at TaskUs is keeping the Client Services teams focused on the key aspects of account growth. Integrations implemented with multiple business systems helped digitize the account planning process within a few months, and TaskUs experienced a boost in their productivity by at least 20%. Key Account Management is institutionalized, by leveraging the inbuilt framework instead of starting from the ground up with every new tool and methodology.

Sean Neighbours

Senior Vice President, Strategic Accounts



"DemandFarm is all the things I wish Salesforce did for account management from the start. DemandFarm brings all the effort put into Salesforce to light in a simple and easy format. It provides the ease of use to plan, understand and map individual accounts along with a summarized view by sales vertical for the whole company."

Company: TaskUs

Headquarters: Texas, United States

Industry: Digital Outsourcing Services

Total Group Revenue: ~USD 500 Million

Solutions used – Account Planner

Jarrold Johnson

Chief Customer Officer



"It is the most robust, integrated, strategic account planning tool I have ever seen. It has completely changed the way we think about strategic account planning and large account penetration. It helps you map the organization, measure your touch points, and integrate your pipeline data with your product data, whitespace data. It's unbelievable!"

Client Background

TaskUs is an outsourced digital services and next-generation customer experience provider to several innovative and disruptive technology companies. It helps the world's largest tech companies represent, protect, and grow their brands online. Founded in 2008, TaskUs has expanded its footprint across the globe with approximately 27,500 employees. In a world where people are turning towards social media and the internet before making purchase decisions, ensuring positive word of mouth requires skill, and tech smarts.

These skills are abundant at TaskUs, which explains why market leaders across industries, like Uber, Facebook, Doordash, Tinder, Netflix, Autodesk, Zoom and others, use its services. With such a clientele, it is imperative that the organization grows – and with growth, comes the need to adopt the latest technology to simplify work. While teams at TaskUs were up to the task – the tools that were being used had little compatibility: this resulted in the Client Services team leaders striving hard to find a common ground for adoption, collaboration, and rigor in the account planning practices.

Challenges Encountered

- ▶ Account Planning Process distributed across multiple systems.
- ▶ A steadily growing key client base which contributed over \$10 million in revenues each, needed a focused, strategic, and effective approach.
- ▶ Account teams could not effectively map against existing data sets and lack of actionable insights.
- ▶ Consolidated reporting and slide deck creation efforts were hard to execute.
- ▶ Account planning practices lacked rigor and teams were striving hard for adoption and collaboration.



Implementing DemandFarm: Systematizing Key Account Planning and Management process

The scale and the duration of the project required DemandFarm to work closely with Sales Enablement teams at TaskUs, and this helped immensely in plotting out the account landscape.

- ▶ Account Planner (Enterprise) with its rich set of account planning, tracking, and reporting features, was used to systematize Key Account Planning & Management process.
- ▶ DemandFarm team members mapped out TaskUs offerings against the buying centers inside respective Client organizations, and quantified the whitespace in a formal map.
- ▶ Visual Heat Maps were used to mark the account health in terms of engagements, active opportunities, win-loss and revenue.

An OrgChart was created for the Account Management team to help reach the decision makers in client organization. Visual Relationship Mapping and analysis of “Who,” at “What” level, and “Where” contacts fit in for active opportunities. At an Account level, the solution enabled strategic planning powered by right information. At a Portfolio level, it provided reports and insights that helped TaskUs leaders analyze probable actions and execute them effectively. These insights were drawn from the integration of Account Planner (Enterprise) with TaskUs financial system (Oracle Fusion), linked files (Data Studio), and cNPS data (survey results). With this, Account Managers could get a holistic view across planned, actual, and forecasted revenue.



Integrating Account Planner with multiple business systems at TaskUs resulted in digitization and a comprehensive approach to Key Account Management without having to start from ground zero. Account Planner has helped TaskUs develop a common language within Client Services to manage and grow existing account portfolios. It also ensured the global teams to go after the right accounts, build healthy relationships and create actionable revenue forecasts.

Access to Key Insights, presentation of relevant data in an automated fashion, visibility of Pipeline yields on top of base revenue forecasts, and Pipeline footprints for all accounts in real time empowered the Leadership teams. The organization has shown a growth rate in double digits since 2021 – thanks to DemandFarm's superior whitespace-ing and Account Planning capabilities.

- ▶ **Boost in client services team's productivity** by at least **20%** with focus on the key aspects of account growth.
- ▶ In their Strategic Accounts, TaskUS registered a **30.6% increase in up-selling (mining)** and a **16% increase in their cross-selling (farming)**, after bringing DemandFarm on board.
- ▶ **Multiple offerings by TaskUs** showed a tremendous year-on-year growth, averaging above **40%**.
- ▶ **1.04B dollars annual revenue** only from their strategic accounts!

TaskUs has grown multifold since 2021, with the Assisted Account Planning approach championed by DemandFarm. Our success story lies in their success, and ensuring that we repeat the same growth journey for their new Key Accounts as well.

Want us to elaborate further on the
Best Key Account Management practices?

Talk To Us



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Find Out More About The Account Planning Process For Key Accounts