

Allvoices

Sales Cloud RevOps, delivered week by week.

Industry: B2B SaaS

Region: United States

Engagement: Managed Services

Headline results

CSAT SCORE

TBD

Survey in flight

TASKS DELIVERED

28+

Since spring 2024

YEARS PARTNERED

2+

Continuous engagement

CROSS-VENDOR FIXES

1

Planhat data-integrity

The need

Allvoices runs a fast-moving sales motion across paid search, paid social, and outbound — with sophisticated Lead Source attribution, Account scoring, and a Planhat Customer Success integration. Their team needed a Salesforce partner who could ship discrete, high-precision RevOps changes on a recurring cadence — no full-time admin, no oversized retainer.

What we delivered

- Sales process automation: Account Grade scoring, Lead Source UTM rules, Sales Pipeline tracking.
- Lead-to-Account field mapping and conversion automation to keep data clean at handoff.
- Recurring batch updates on Lead, Account, and Opportunity records to keep CRM and Planhat aligned.
- Root-cause investigation and cross-vendor fix coordination when integrations misbehaved.

CUSTOMER QUOTE — [pending Justin's CSAT survey response]

"[Quote here. Aim for 1-2 sentences naming a specific outcome.]"

Justin Berger, Allvoices · Survey sent 6/10/2026

How the partnership runs

Four workstreams, on tap. Allvoices opens tasks; we close them.

Automation builds

Account Grade scoring relaunch for Lead and Account. Lead Source attribution rules across Google, LinkedIn, Meta, and TikTok. Sales Pipeline 'Close Q Pushed' tracking. Dock MAP workspace-access automation.

Batch data integrity

Recurring updates to Number of Employees, Frontline ICP, RFP markers, and Status to Meeting on Lead and Account. Spreadsheet-in, clean data out — on a steady cadence.

Bug investigation & fixes

Diagnose, root-cause, coordinate. Including investigation across the Salesforce platform, Slack alerting, and third-party integrations like Planhat.

On-call Salesforce support

Hours-based emergency response when something breaks. Reliable triage without retainer lock-in.

FEATURED ENGAGEMENT — THE PLANHAT CASE

An Account field was being silently overwritten every night at 8 PM.

Allvoices' Account 'Number of Employees' values were resetting overnight. We traced it to a Planhat US Connected App running a bulk-data job daily at 8 PM, overwriting Salesforce values via the API. We opened Salesforce Support case #54177357, isolated the call pattern, and coordinated a fix with the Planhat team so the data stayed clean.

WHY ALLVOICES STAYS WITH TGWS

- Task-based, not retainer-locked. Pay for what you need; scale up or down on cadence.
- Sales Cloud-only focus. Deeper expertise per hour than generalist firms.
- We own the messy ones. Cross-vendor investigations, third-party API bugs, data integrity.