

2021 OpsStars Awards

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by LeanData

Lead Management Program Transformation of the Year

An operations-led initiative that drove transformational change in the people, process and technology of the lead management engine to improve speed, accuracy and agility lead distribution and response.

The Winner



The Challenge

Leading global commerce company Shopify had been experiencing impressive growth. However, the Global Revenue Technology and Operations team wanted to implement a best-in-class lead management process that was fast and flexible enough to support the changing needs of their merchants.

While there was an existing process in place, it relied on custom code within the CRM and manual processes spread across multiple technologies. The team wanted to streamline the process into a single source of truth so that they could quickly react to merchants who reached out to Shopify.

The Operational Approach

Shopify began working with LeadMD to revisit and optimize Shopify's existing revenue process, with the goal of improving efficiency and thereby meeting the needs of their merchants.

A series of strategic workshops were held and they identified the need for out-of-the-box software to automate manual tasks, and brought in LeanData to handle the lead and opportunity routing. In about six months, they strategized, designed and optimized the existing revenue process, which was a major component of its lead management program.

Operational Results

Now with LeanData firmly in place, Shopify has also experienced the benefits that have come with removing unnecessary complexity from their technology stack like the software running faster and smoother. The system is clean, they have better data and the team is saving time through improved efficiency.

The time saved has meant that Shopify's teams are able to spend more time with prospects and merchants, and deliver a best-in-class experience.

“Shopify has revamped its revenue process and its lead management program, creating numerous efficiencies which roll up to time savings and profitability. Best of all, all of our systems now work in unison, smarter—but not harder—for better results. The overall project has resulted in best-in-class processes and measurable efficiency.”

- Chantelle Marchionda, Marketing Technology Lead