

insightly

A Go-to-Market Perspective

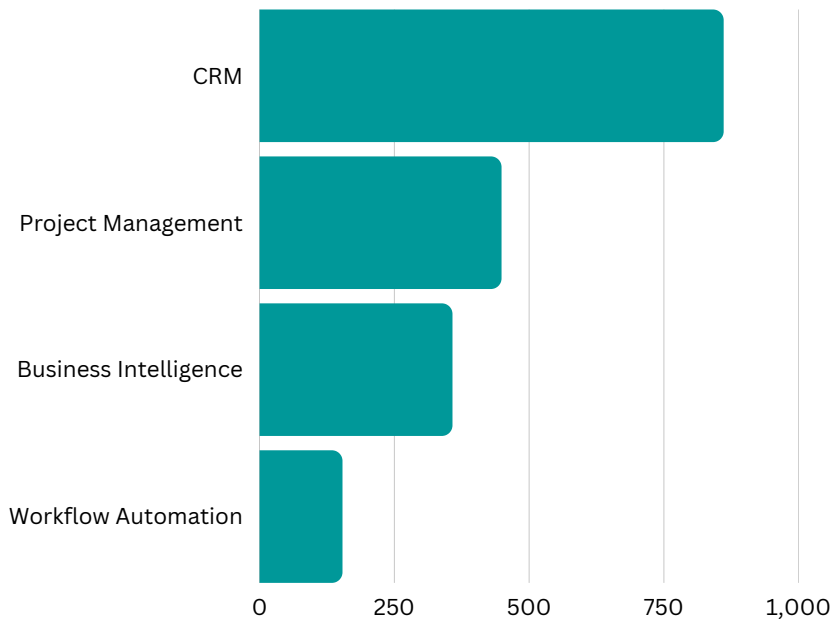
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Customer Use Cases & Value Definition

In reviewing feedback from hundreds of users, we have determined that Insightly's primary value propositions are widely experienced by their customers.

Top Use Cases Cited by Insightly Customers



Customers tell us that Insightly:

- Is easier to use than other CRMs
- Molds to your business
- Is the best CRM for project delivery
- Doesn't require admins or IT
- Makes the reporting process simple
- AppConnect (Insightly's no code/low code integration tool) easily connects CRM with your business tech stack
- Enables better customer relationships & improves productivity

USE CASE	WHEN TO PRIORITIZE TECH FOR YOUR GTM MOTION
Manage your sales pipeline	If you need an easy to implement and scale CRM, modern CRMs like Insightly help sales teams more efficiently manage their lead and opportunity pipelines, improving lead qualification & routing, deal visibility, deal velocity, and accurate forecasting.
Automate workflows & project delivery	Automation decreases errors, eliminates paperwork, and keeps teams focused on selling. Having a CRM with built-in project management helps deliver on time and keeps the tech stack manageable.
Molds to your business	Legacy CRMs force you to do business their way, modern CRMs mold to the way your business runs. Removing the need for IT & admins lowers the total cost of ownership and speeds up user adoption and time-to-value.
Unify Go-to-Market teams	Having CRM, marketing automation, and customer service on the same platform and dataset, plus easy integration across the tech stack ensures GTM teams stay connected.

QUOTABLES

"Everything you need in a CRM is all here"

"Insightly CRM revolutionized how we manage clients & streamlined our process"

"Much lighter to use than competitors but still packed with features"

"As a CRM expert who helps clients implement CRM systems, Insightly is my go-to"

"So easy a beginner can use, yet the software has features even a data nerd appreciates"

"Makes it easier for us to deliver great customer experiences in a way other CRMs just can't"

Insightly's ROI

Compared to the CRM market leaders, customers tell us that Insightly offers friendly contract terms, faster go-live, and quicker payback

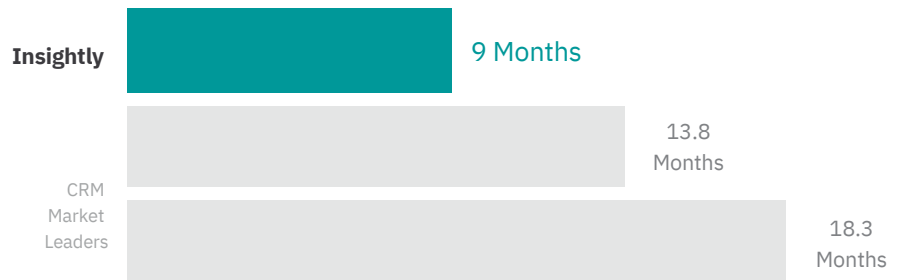
Lower Perceived Price



Faster Go Live Time



Time to ROI



Revenue Outcomes with Insightly

Insightly customers report improved growth rates compared to prior approach to CRM

242%

Growth in Revenue
Sport Court LV

360%

Growth of installations in 3 months
Better Earth Solar

6,000

New customers onboarded using project pipelines
We Got POP

** Quotes and stats are from our research, customer interviews and reviews submitted through G2.com*

About GTM Partners

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GTM Partners, a data-driven Go-to-Market Analyst firm helps organizations and GTM vendors to achieve efficient growth by transforming their GTM strategy. We work with high-growth companies to help them unify their GTM teams and to provide them with lasting strategies and frameworks. GTM Partners, with a mission to make Go-to-Market simple aims to be the voice of the industry for all things GTM.

We do this by offering:

1. Data and benchmarks collected from data providers, including G2 and Bombora, as well as our community of the world's fastest-growing companies.
 2. Research, best practices and design frameworks to provide guidance on the best-in-class approaches to strategizing, executing and tooling your Go-to-Market approach.
 3. Personalized advice and support from experienced leaders and practitioners that help you address business challenges in a manner that is authentic and specific to you.
 4. Events and networking with industry leaders looking to define the category of Go-to-Market and revolutionize the way we create value for our organizations.
- Our consulting work focuses on areas such as Go-to-Market strategy, creating a Point of View and Go-to-Market project execution strategy across the 8 pillars of GTM.

About the analysts



Bryan Brown
Chief Analyst

Bryan is a SaaS pioneer and thought leader in the marketing and sales tech industry. He has both created and brought to market innovative software products and ideas while helping thousands of companies in their effort to grow revenue more efficiently. Bryan is a co-founder with multiple exits (Vtrenz), has led strategy teams in Fortune 100 Companies (IBM) and has helped multiple organizations scale their products & Go-to-Market approaches from point solutions to platforms via organic product development and through mergers & acquisitions (Silverpop, Terminus). His work over the years has been instrumental in forming new categories and securing top placements for his companies in both the Forrester WAVE and Gartner Magic Quadrant reports.



Lindsay Cordell
Senior Go-to-Market Analyst

Lindsay is a practitioner turned analyst who studies best practices and trends in Go-to-Market and develops actionable models and blueprints for our clients. She has held both practitioner and leadership roles in almost every aspect of Go-to-Market, including Product, Marketing, Sales, Revenue Operations, and Enablement for several Fortune 500 companies, including AT&T, Hearst and Cox. She most recently ran the GTM Center of Excellence for the Account-Based Marketing Platform Solution Terminus.



Sangram Vajre
Industry Analyst

Sangram is a three-time best-selling author and co-founder of several organizations, including Terminus, The Peak Community and most recently, GTM Partners. Sangram has been at the forefront of B2B marketing trends, the Flip-my-Funnel movement, and defining the Account-Based Marketing category ushering in a new generation of marketers. He has previously held CMO roles at Pardot, a Salesforce company and Terminus.

More on GTM Perspectives

GTM Perspectives are third-party validated assessments of Go-to-Market Vendor Solutions that are primarily focused on how to get the most out of an investment in technology. Centered around use cases (as opposed to vendor stack ranking), these guides are intended to provide readers with a data-driven analysis of what problems the solution is intended to solve and how well it delivers on those promises.

Perspectives are developed in three stages. First, we will work with the vendor to learn about their capabilities. The vendor must respond to a use-case-driven market survey, provide a demo and give us insight into their roadmap. Next, we analyze G2 data to understand how the market at large is using the solution and what they find to be most valuable. We also review feedback on the entire segment to understand how that vendor performs against its competitors or similar solutions in the use cases specified. Finally, we speak with three customers to better understand their primary use cases, get an understanding of any additional investment outside of the cost of the solution and confirm any need for additional investment in companion solutions required for the use cases to be performed.

GTM Perspectives are developed at the request of our Vendor Partners, who provide us access to their customers and support our understanding of the solution we are validating. GTM Vendor Partners are held at an arm's length during the development of the perspective to ensure we produce an unbiased, data-driven review.

GTM Partners is committed to improving the lives of Go-to-Market teams through the development of frameworks, guides, tools, and perspectives.



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