

## Case Study

# How TrendyMinds identified 50% more upsell and cross-sell opportunities in their key accounts

## INDUSTRY

Marketing  
Agency

## USE CASES

Standardised account planning, white space planning, relationship mapping, key account revenue forecasting

## THE DEMANDFARM IMPACT

**1 to 14**  
PER ACCOUNT

Increase in strategic account reviews

**12%**

Uptick in deal win rates

**80%**

Increase in no. of relationships mapped

**50%**

In no. of cross-sell and upsell opportunities

**2x**

Increase in total opportunities

**43%**

Increase in white space conversion

## BEFORE

- Absence of standardized account planning led to inconsistent revenue projection from key accounts
- Account planning relied on spreadsheets and disjointed tools leading to inefficiencies
- Poor visibility into complex accounts led to revenue leaks and wallet share tracking was difficult.

## AFTER

- DemandFarm's account planning suite enabled AMs to adopt a structured approach to account planning
- A centralized account planning system eliminated multiple tools freeing AMs from duplicate work.
- Complete visibility into key accounts allowed AMs to spot growth opportunities and proactively engage key contacts

We spoke with Jeremy King, Lead Strategic Growth at TrendyMinds. He walked us through three major objectives of their account planning program.

**Drive predictability in revenue from key accounts:** TrendyMinds sought to establish an account planning framework that would help them harness predictable growth from their key accounts.

**Get full visibility into growth bottlenecks:** Lack of visibility on which contacts to engage, uncertainty over factors fueling account growth versus stalling, and the need for client partner teams to fully understand customer goals for confident upsell and cross-sell conversations drove them to seek out a process-driven approach to account planning.

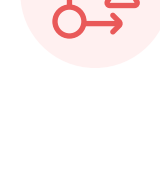
**Transform account planning from a reactive to proactive exercise:** TrendyMinds wanted to make every facet of account planning proactive, from revenue forecasting to contact engagement. They recognised that chasing RFPs is a time sink, by the time one arrives, clients have usually chosen a vendor and are only looking to negotiate pricing

*“Our relationships are what has propelled our growth. When it’s your biggest source of growth you want to take care of those people. I wanted to ensure we were more intentional about those relationships. And that’s exactly where DemandFarm fit in!”*

Jeremy

## Key Challenges

Here are key challenges that Jeremy wanted to tackle.



### Lack of process standardization

TrendyMinds wanted to ensure client partners knew every detail —understanding each client's business priorities, identifying which buying centers to target, which services to pitch and more. Without a tool that facilitated standardised account planning, Jeremy felt growth often relied on luck rather than preparation. This gap nudged him to build a structured system for predictable revenue from key accounts.



### Poor visibility into complex account dynamics

Without proper visibility, the client partner teams often ended up engaging only a handful of contacts in each buying center, missing out on the broader executive circle necessary for deal momentum.

They also struggled to identify success patterns owing to the sheer complexity of services and buying centres.

In one key account, a previously thriving service abruptly dropped, and without clear data, the team couldn't determine the factors responsible.

*“We have had projects where we have to speak to 50 different people, and it’s complicated and there’s no visibility. The other kind of visibility we didn’t have was answering why we are growing in certain areas.”*

Jeremy



### Melange of disjointed tools

The client partner teams relied on multiple systems—Parallax, Harvest, Asana, Salesforce, and a host of spreadsheets to create account plans. The disjointed approach meant that vital information was scattered across various platforms, making it difficult to obtain a unified view of accounts, especially with their large clients that had up to 30 contacts sometimes in just one buying centre.



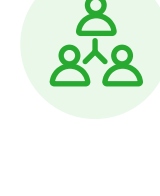
### Tedious manual work leads to inefficiencies

The manual process of updating and reconciling data across these systems was a constant drain. Plus, everyone seemed to have their own version of data that only led to inaccuracies. Jeremy estimated that the team was spending one to two hours daily, amounting to five to ten hours per week, on repetitive data entry instead of focusing on strategic client engagement.

*“We want to move client partner teams away from data entry and project management. We want them to be talking to clients, strategising.”*

Jeremy

## The Solution



### Systematic approach to account planning

DemandFarm enabled client partners at TrendyMinds to adopt a structured approach to relationship mapping, white space identification and revenue planning. A unified view of all account information in one place, right within Salesforce has helped them drastically ramp up account reviews for proactive course-correction.

*“We have gone from one to fourteen strategic reviews, per account. And that’s huge!”*

Jeremy



### Clear view of untapped expansion opportunities and stagnant accounts

DemandFarm's heatmap helped TrendyMinds proactively pinpoint where they were growing and where they weren't. Leadership recognised the heatmap as more than just a tool, it became a process for identifying and acting on expansion opportunities.

*“I'll give you an example, the Heatmap showed us we hadn't sold anything since summer of last year in one of our biggest enterprise accounts. And DemandFarm showed us that, something we would have never realised if not for it. And our board loves the insights DemandFarm offers, so much that it's been made best practice.”*

Jeremy

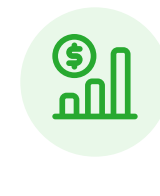


### Full visibility into stakeholder and buying committee dynamics

End-to-end visibility of stakeholder affinity, opportunity involvement, and their influence provided TrendyMinds the ability to engage the entire buying committee. This helped teams go into upsell or cross-sell conversations with more confidence.

*“Love the visibility that Relationship Map gives us. I get to know who's active, what level we are within the organization, and who we need to build a better stronger relationship with, and how those interact. We even use all the context to determine our pitch as you can't talk the same language to a champion and a skeptic”*

Jeremy



### Improved revenue forecasting accuracy in key accounts

DemandFarm's accurate, consolidated revenue reports enabled TrendyMinds to part ways with the menace of multiple revenue reports with conflicting figures. Now, a single unified view that clearly distinguishes booked from actual revenue guides their planning.

*“I live and breathe by the Grandstand, that is just the greatest snapshot for me. I'm looking at what's in the pipeline, what we've lost, I'm seeing our revenue trend lines. We use DemandFarm as a tool to really understand pipeline health and not just look at the single numbers.”*

Jeremy



### Seamless onboarding and internal alignment

DemandFarm proved invaluable for onboarding new team members, providing an immediate, comprehensive view of key accounts and the overall strategic landscape.

*“Interestingly I use it as an onboarding tool. So when we have a new person on the team, I will pull up DemandFarm and I'll walk our team through it. All the context they need is in one place”*

Jeremy

## Standardise Account Management with DemandFarm

See it in Action