

A top-tier consulting firm used 9Lenses to win a contract with a new client, creating opportunity for additional engagements



A company was assessing consulting firms to help improve its CRM system

A Fortune 100 conglomerate needed external consultants to help determine why its CRM was underperforming and develop a roadmap to make it a powerful sales enabler.



The consulting firm's initial proposal was too high and was rejected

A partner at the consulting firm proposed an engagement to identify the root causes of the CRM system problems and create a 2-year roadmap that would guide the improvements. The proposal called for the firm to conduct a number of stakeholder interviews at the client company to gain insight into the CRM problems. Given the size of the consulting team and the timeline required to execute those interviews, the firm's bid was higher than the company was willing to pay, and thus the company rejected the bid.

The firm used 9Lenses to bid more competitively, protect margins, and win the contract



In order to reduce the cost of the project to meet the company's budget, the firm decided to use 9Lenses. 9Lenses is a software platform that "interviews" key stakeholders and then connects and analyzes these quantitative and qualitative insights. The partner at the firm identified 9Lenses as a tool that could perform and accelerate the discovery phase of the project, cutting down on the time and resources needed. By using 9Lenses, the partner was able to bring down the bid by a significant amount. The company accepted the new bid, winning the firm the contract.

The firm's use of 9Lenses opened the door for additional engagements with the company

Using the 9Lenses platform, the firm interviewed 500 of the client's salespeople globally, collecting quantitative and qualitative data around 9 topic areas over a period of 12 days. With the results from the interviews, the firm identified a number of causes around why the CRM system was underperforming. The 9Lenses software sorted insights by role, region, and sub-business unit, allowing the firm to pinpoint the particular issues for each segment. These insights were presented to the client and used as an input to the roadmap deliverable. The firm was then well positioned to implement the recommendations and, importantly, to expand the client account.

9Lenses Interview Experience

The screenshot shows a web interface for a 9Lenses interview. The title is "7. Data Quality" with a subtitle "The accuracy and usefulness of the information contained in the CRM tool." There are two tabs: "Not Applicable" (selected) and "Not Applicable". A rating scale from 1 to 9 is shown, with "Average" at 5 and "Excellent" at 9. Below the scale are two text input fields: "Please explain your perspective" and "Please propose actions". Each field has a "1000 characters left" indicator and an "Attachment" button. At the bottom, there are three checkboxes: "Organizational communication is needed around this topic area", "Organizational training is needed around this topic area", and "I can personally help improve this topic area". There are "Next" and "Back" buttons at the bottom.