



Business Model: Software with a service
 Medium Business: 21-100 people
 Growth stage: Growth

Payflo automates 83% of sales process

We turned a highly manual process into a nearly fully automated process providing leads timely and tailored information that increased conversion rates and decreased manual effort.

- Services used
- ✓ Current State Mapping
 - ✓ Future State Mapping
 - ✓ Ongoing Support

1,000+

Automated Monthly Emails
Nurturing Leads

Ready to get started?

Contact sales ▶

About

Payflo is a financial tech startup that allows consumers to pay with cash via brick-and-mortar partners, creating payment opportunities for young consumers, the underbanked, and those with privacy concerns. They needed to improve their sales operations, specifically by integrating Hubspot and Monday.com, and utilizing Monday.com as their CRM.

8,420

Automations
Per Month

Challenge

Payflo's two biggest challenges were (1) missed opportunities to capture and nurture leads - inbound leads lacked clear direction when visiting their website so potential leads were bouncing off their website. And (2) a manual client onboarding process - the client onboarding process was manual and time-consuming, which left room for error and confusion within the new client's journey.

600+

Annual Leads Captured
Through Chat Bot

Solution

After exploring several options, Puzzle implemented Payflo's Hubspot-Monday.com integration to align marketing, sales, onboarding, and account management. Three workflows were built to automate and scale the sales process: (1) a chat bot flow, (2) email drip campaigns, and (3) an automated sales call scheduler. Our work automated 83% of the sales process, averaging 8,400+ automations per month.

Now potential leads are contacted immediately with ~600 annual leads captured and sent to Hubspot. Leads get tailored and timely emails, and the system determines when a personal call is needed based on lead scoring. This proactive onboarding process saves sales reps from sending 1,000+ 'next step' emails every month.



This is exactly what we were looking for! Now our sales process is nearly completely automated.

Rob Sigal
Chief Executive Officer

Results

Payflo's capacity has increased dramatically with their newly automated process. On average, 100 new monthly business opportunities are now captured and nurtured automatically. Their sales team no longer sends 1,000+ manual emails and their team's capacity can scale without additional administrative costs.

Turn your chaos into joy with Puzzle

Puzzle's approach is unique in that it prioritizes understanding each business process inside and out before suggesting solutions. Puzzle specializes in business operations and tech stack optimization, combining two often daunting tasks into one ~6-week process with a designated Customer Success Manager and Solutions Architect.

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