



CASE STUDY: PRESALES & SALES

Using Demo Data to Maximize Presales Impact

32%

Reduction in Unqualified Demos

21%

Increased Win Rate when DemoBoard is Viewed

54%

Increased Win Rate when DemoBoard is Shared

Company size

~2,000

Presales Team

350

Sales Team

230 Account Executives

Presales Team

65 Solutions Consultants

AE : SC Ratio

3:1



USE CASE: PRESALES & SALES

Accelerating Implementation with Automated Demos



BlackLine, the future-ready platform for the Office of the CFO, drives digital finance transformation by empowering organizations with accurate, efficient, and intelligent financial operations. BlackLine's comprehensive platform addresses mission-critical processes, including record-to-report and invoice-to-cash, enabling unified and accurate data, streamlined and optimized processes, and real-time insight through visibility, automation, and AI. BlackLine's proven, collaborative approach ensures continuous transformation, delivering immediate impact and sustained value. With a proven track record of innovation, industry-leading R&D investment, and world-class security practices, more than 4,400 customers across multiple industries partner with BlackLine to lead their organizations into the future.

THE COMPANY

Company size	Presales Team	Sales Team	Presales Team	AE : SC Ratio
~2,000	350	230 Account Executives	65 Solutions Consultants	3:1

THE RESULTS AT A GLANCE

32% Reduction in Unqualified Demos	21% Increased Win Rate when DemoBoard is Viewed	54% Increased Win Rate when DemoBoard is Shared
29% of Decrease in Live Demos	1,200 Stakeholders Discovered	7,000 Demos Sent

EXECUTIVE SOURCE



Tom Edwards

Tom Edwards is the Consensus Global Adoption Leader at BlackLine. He was the principal stakeholder in the evaluation and global implementation of Consensus at BlackLine, aligning the project goals with BlackLine's mission to optimize sales performance and customer engagement.

1. THE CHALLENGE

Shielding product experts from unqualified calls

BlackLine's Solutions Consulting (SC) team was stretched to its limits. Renowned for their expertise in financial software and accounting, SCs were frequently pulled into deals too early, limiting their ability to focus on qualified opportunities. Tom Edwards, a Presales leader at BlackLine, uncovered a critical issue: 57% of live demos were repetitive, unqualified, or failed to move deals forward. It was clear the team needed a smarter way to filter prospects, build momentum, and equip sales with essential product knowledge—without wasting SCs' time on dead-end engagements.



"Our SCs have a lot of credibility. They've got the domain expertise and industry experience that buyers trust, and we want them to be able to come to opportunities in a consultative manner. When they're stuck doing repetitive demos, it's a missed opportunity to elevate the conversation towards our customers' desired outcomes."

2. THE SOLUTION

Automated Demos for Qualification

To tackle the problem, BlackLine turned to Consensus, the leading demo automation platform. Edwards and his team recognized its potential to empower Sales Reps and SCs alike by automating the qualification process. With Consensus, they could deliver personalized demo experiences at scale, allowing buyers to explore content independently before engaging with SCs.



"Nothing came close to the level of personalization that Consensus offers our buyers. We had experience with other solutions, but only Consensus provides this depth of personalization at scale while integrating comprehensively with our CRM."

3. IMPLEMENTATION A Playbook for a Global Rollout

BlackLine's global rollout of Consensus was methodical and impactful. From content creation to deployment, the team designed a strategy to ensure instant results and long-term success. Key activities included:

- **Building a Focused Content Library:** Starting with assets for the most frequently requested demos.
- **Engaging Early Adopters:** Collaborating with top sales reps to test and refine best practices.
- **Providing Ongoing Support:** Hosting weekly office hours to mentor and coach reps.
- **Securing Executive Sponsorship:** Gaining backing from the CFO to champion the initiative.
- **Leveraging Internal Success Stories:** Sharing testimonials to drive excitement and adoption.
- **Driving Visibility:** Announcing the global launch at the annual sales kickoff.
- **Iterating with Agile Methodology:** Continuously improving demos based on feedback.

To ensure global effectiveness, BlackLine also tailored content for major geographic markets. Internal contests encouraged SCs to create concise, high-impact demo segments, keeping the team engaged and enhancing their skillsets.



"Having a strong executive sponsor and using an agile methodology were key to our success. We didn't want implementation to be a one-time event, rather, we wanted it to be an iterative process where reps could give input and valuable feedback that we could use to make the right impact on buyers and their decision making."

4. THE RESULTS Presales Impact At Scale

By automating demos, BlackLine transformed its Presales process, enabling SCs to focus on high-value activities. Results included:

- **Fewer Live Demos:** A 29% reduction in live demos allowed SCs to dedicate more time to qualified opportunities.
- **Decreased Unqualified Engagements:** "Wasted" demos dropped by 32%.
- **Accelerated Deals:** Over 7,000 automated DemoBoards replaced repetitive intro calls, helping buyers come to meetings prepared with meaningful questions.
- **Increased Engagement:** Automated demos uncovered more than 1,200 additional stakeholders within buying groups, fostering alignment and accelerating decisions.
- **Higher Win Rates:** Deals involving automated demos saw a 21% higher dollar win rate and a 54% boost when demos were shared within the sales cycle.



"Our Solutions Consultants now get to deflect low-impact demos and focus on building and maintaining momentum in the opportunities that are most likely to close. We see the impact of Consensus throughout the sales cycle, making our time with the buyer count. It also helps us continue to influence buyers between live meetings as they revisit content and share demos with their fellow stakeholders"

Key Takeaways

- Predictable Pipelines: Demo automation helps sales teams focus on the most impactful opportunities, driving predictability and efficiency.
- Content is Key: A small but strategic library of demo assets can make a big impact.
- Scaling Presales Effectively: Automating repetitive tasks allows SCs to focus on consulting and closing deals.
- Executive Sponsorship Matters: Strong leadership support ensures smooth implementation and sustained adoption.



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Sales engineers, solution architects, and sales leadership rely on Consensus demo automation to reduce wasted demos from 50% to 5% and cut average demo wait time from 14 days to on-demand. This leads to shortening sales cycles by as much as 68%. Consensus customers including Autodesk, Atlassian, Dell, Oracle, Salesforce, and SAP rank Consensus #1 in G2 ratings for Presales Software.

Learn more about demo automation, buyer enablement, and best practices for scaling Presales at goconsensus.com