

How Finastra orchestrates all go-to-market functions with ClickUp to boost business performance

Finastra is the largest pure-play Financial Services software company and serves ~8,600 financial institutions, providing the broadest, deepest software applications and connectivity to marketplaces, partners and fintechs through an open platform, orchestrating the future of financial services.



30% increase in collaboration effectiveness



40% growth in total go-to-market (GTM) efficiency



Many innovative buyer journeys developed through better orchestrated touchpoints

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The challenge: Fragmented GTM planning obstructed go-to-market visibility

Tasked with driving growth for Finastra, the company's marketing team was experiencing challenges caused by fragmented GTM plans, defined in different formats, and stored in several repositories. This resulted in campaigns inconsistently delivered and customer journeys that had room for improvement.

The team of 120+ staff was handling all marketing related demand generation functions. However, there was no central platform for all GTM plans by Business Unit, Geo, or campaigns to come together. Plans were scattered across multiple file locations, such as MS Teams, SharePoint or locally on laptops and in various formats, including Excel and PowerPoint. It was hard and time consuming to provide stakeholders with transparency in real time.

To mitigate this, the team spent hours in meetings delivering essential updates to stakeholders via slideshows on their GTM plans and their performance.



The fragmented structure made it difficult for senior leadership to gain visibility into what GTM activities were taking place at any given time, and for which business unit. Imagine 200 slides of marketing plans that are outdated the second we produce it.

JOERG KLUECKMANN, VP OF MARKETING AT FINASTRA

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The Solution: Unifying productivity platform aligns teams and boosts efficiency and effectiveness

Finastra chose [ClickUp](#) to help the company drive collaboration and transparency around GTM initiatives. Finastra evaluated several vendors, and ClickUp was the clear winner thanks to its usability, automation, and analytics. Today, Finastra's marketing and sales teams use ClickUp to orchestrate demand generation across all Business Units and regions.



We can show what's happened with our marketing initiatives in a regional view or a campaign view. This includes looking at what types of activities we're running and what funnel stage we've tagged them to. This way, senior management can easily get up to speed on a project's status.

DARIA GÎRJU, DIGITAL DEMAND GEN LEAD AT FINASTRA



Our mentality is, 'If it's not in ClickUp, it doesn't exist.' So nowadays, it's essential that every single marketing activity is input into ClickUp where it'll be visible to all stakeholders.

JOERG KLUECKMANN, VP OF MARKETING AT FINASTRA

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The conclusion: Working as a team toward a common goal

With ClickUp Finastra's GTM functions could transform their working style, improving both transparency and collaboration. Leveraging the platform has allowed the team to streamline GTM processes so employees can focus on marketing the company's industry-leading financial software. And increased transparency has led to better internal working relationships.

The Results



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