

# How Plan, Inc. discovered \$150K+ of potential revenue within their first 2 weeks of using Warmly



Founded in 2016 in San Francisco, [Plan](#) is a B2B startup specializing in easy-to-use productivity tools. Their software integrates with tools like Slack, Email, Github, and JIRA to better manage everything you have to do and everywhere you have to be”, saving teams around the world ~15 hours per week.

Scaling customer success and sales efficiency is a top priority for Plan since it’s a 5 person team that services thousands of clients, including Uber and J.P Morgan.

## Challenge

Plan’s early customers ranged greatly across industry, sector, and occupation. From Gold miners in South Africa to apparel manufacturers in London to tech teams in the US.

While it was nice to have a lot of users on their freemium plan, Plan didn’t have a good sense of who their ideal customer was. With hundreds of signups a day Plan’s CEO, Darshan Desai, told us they continued to find themselves “shooting in the dark” trying to understand their client and find who best to upgrade to their enterprise tier

## Solution

### I. Data enrichment to help Plan better understand their core user

Warmly enriched Plan’s client data, enabling a far deeper understanding of their user base. Warmly found that students in 1,000+ universities were using Plan, which armed them with vital intel that guided their business and sales strategies.

“We learned things about our user base in one week that we hadn't known for 3 years”

## II. Identifying clients ready to upgrade from Freemium to Enterprise

Warmly identified clusters of users who were using the free, individual version of Plan at the same company. This supplied Plan with qualified leads into several enterprise deals.

Prior to using Warmly, 1 in 100 emails would result in a sale. Whereas today, it's 1 in 15.

“We're using Warmly to find leads for our enterprise tier. We got 3 sales in the first week and discovered ~\$150K in potential revenue. Warmly is a no brainer.”

*Darshan, CEO of Plan*

