

urban. +  Salesbuildr

Control Restored

— A CASE STUDY —

How Urban Network fixed their revenue engine



— THE CONTEXT

Scaling Maturity

Founded in 2002, Urban Network is a mature, process-driven MSP. With 25 staff serving 240 clients, they needed a toolset that could match their operational discipline.

25 **240** **3**

STAFF

CLIENTS

OFFICES

"Standardization is the way we've always run our business. It's how you get economies of scale."

— THE CHALLENGE

The Trust Gap

Even for a mature MSP, flexibility in the wrong places can create operational friction.

Portfolio Sprawl

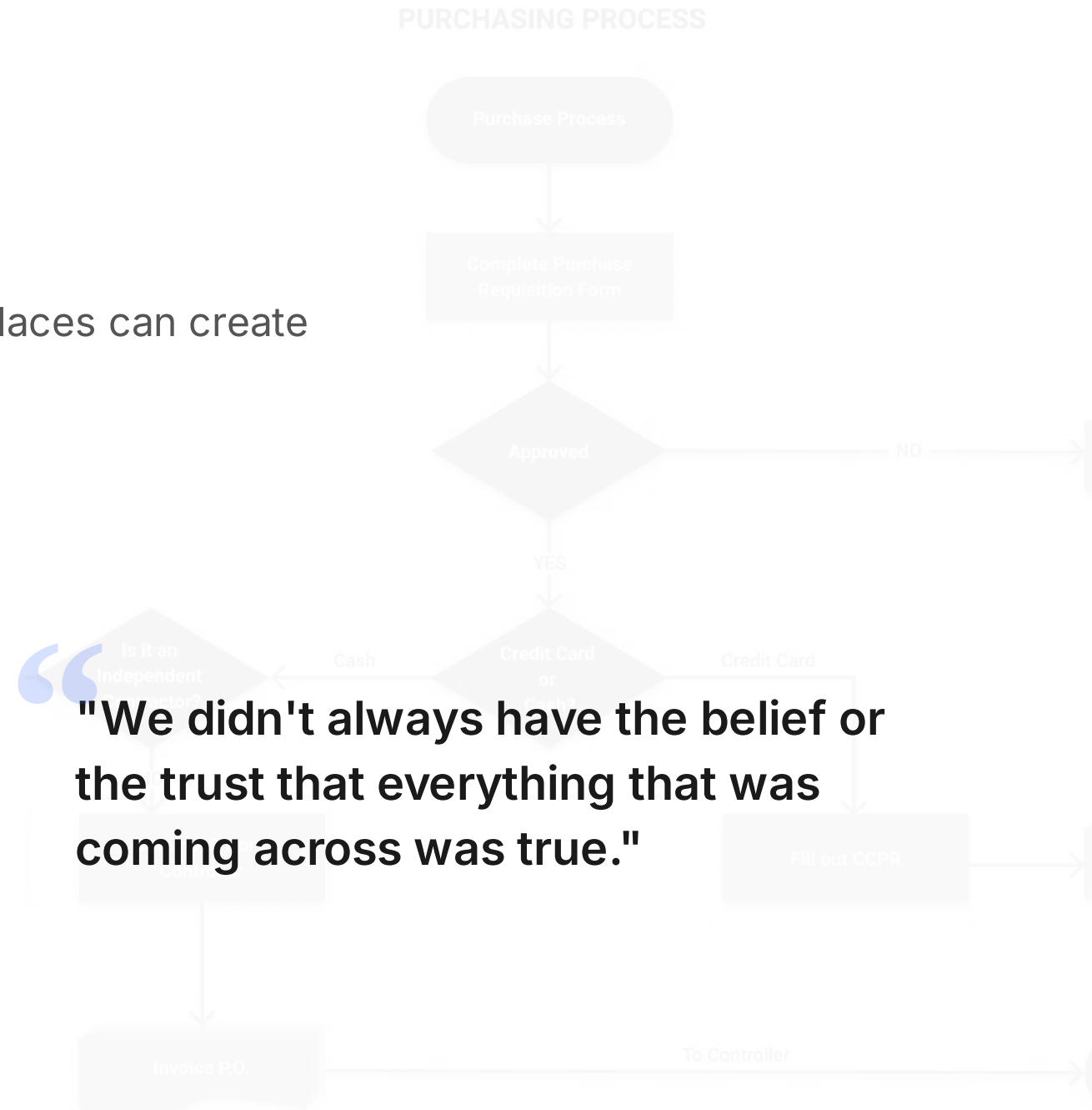
The previous tool allowed users to name products freely, leading to a lack of standardization across the portfolio.

Integration Uncertainty

Sync errors with the PSA meant the team couldn't always trust that the data being transferred was accurate.

Sales-Delivery Gaps

Discrepancies between what was sold and what could be provisioned caused concern for the delivery teams.



— THE SOLUTION

The Strategic Choice

Urban Network evaluated the market, prioritizing operational maturity and partnership over simple feature lists.

✓ **Maturity Over Price**

The decision wasn't driven by cost, but by finding a tool that matched Urban's level of operational discipline.

✓ **Deep Alignment**

Urban needed a partner that understood the nuances of their specific service delivery model.

✓ **Native Integration**

Salesbuildr's deep, two-way sync with AutoTask was a critical differentiator for restoring trust in data.

“

"It's not always about price. It's about the maturity of the product. I needed a partner that walked down that road with me."

Building Confidence

Moving a revenue engine is a huge decision. Urban Network validated the move through a rigorous process.

1

Proof of Concept

Before switching, Urban ran a POC to ensure the tool was more mature than their existing solution and could handle their specific workflows.

"It immediately demonstrated to us that the tool was more mature... it gave us the confidence that we can move forward."

2

The Buyer Test

The team "pretended to be the buyer" and found the process significantly more fluid, removing barriers to signing that existed in the previous tool.

"We pretended to be the buyer... and it was a lot more fluid. The barriers just wasn't there."

3

Team Adoption

Because the tool was stronger and the templates were defined, the team adopted it quickly. It solved their frustrations rather than adding to them.

"The team were comfortable in moving into a tool that was quite frankly stronger than the one they were using."

— BEFORE

Manual Effort

- ✗ **Variable Scopes**
Dependent on who wrote them, creating inconsistency.
- ✗ **PDF Sign-offs**
Static documents created friction in the closing process.
- ✗ **Limited Reuse**
"Cut and paste" from old docs introduced errors.

— AFTER

Operational Maturity

90%

- ✓ **Efficiency at Scale**
12-15 templates now cover ~90% of all business.
- ✓ **Digital Clarity**
Signed digital scopes lock in deliverables instantly.
- ✓ **Brand Consistency**
A unified "Urban Network tone of voice" across all quotes.

"There's an Urban Network tone of voice... consistent no matter who writes it."

— THE RECOMMENDATION

The CEO's Verdict

Painless Transition

"The transition from the existing tool to Salesbuildr was pretty painless. That's probably the best advocacy you can have."

Knowledgeable Team

"The engagement of the team was key. They were incredibly knowledgeable and open to working with us to ensure our workflows worked."

Future Proof

"Salesbuildr matches where we are right now, and I don't see that changing for the foreseeable future."

"If someone asked me what I'd recommend... Salesbuildr would definitely be up there. It's a strong recommendation."

— PERRY ASHBY, CEO



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