CASE STUDY

How ICE Mortgage Technology Turned Account Planning Into Revenue Execution with Altify

ICE Mortgage Technology™

ICE Mortgage Technology used Altify to move strategic account planning from static documentation into visible, repeatable revenue execution. By embedding strategy in Salesforce, Altify helped teams align around accounts, clarify ownership, improve manager coaching, connect AI insights to action, and turn collaboration into an operating rhythm for driving opportunity execution and growth.

INDUSTRY

Financial services tech

COMPANY

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ICE Mortgage Technology helps lenders, servicers, and housing finance organizations streamline the mortgage lifecycle through digital mortgage solutions that support origination, and real estate.

ICE Mortgage Technology had the strategy. The opportunity was turning it into consistent action.

ICE Mortgage Technology, part of Intercontinental Exchange, helps lenders, servicers, and housing finance organizations streamline the mortgage lifecycle through digital mortgage solutions that support origination, and real estate.

As a complex enterprise revenue organization, ICE Mortgage Technology already had many of the right foundations in place. The team had invested in Salesforce, account planning, strategic selling methodology, enablement, and revenue discipline. Leaders understood that major accounts required more than activity tracking. At the same time, sellers knew account strategy mattered. And that vital layer: managers knew coaching could improve deal outcomes.

The challenge was not whether strategic selling was important.

The challenge was making strategic selling visible, repeatable, and actionable inside the daily rhythm of the business.

Account plans could become static. Deal reviews could drift into status updates. Cross-functional ownership could become unclear. Sellers might understand the methodology, but under the pressure of live opportunities, execution could become inconsistent. AI could generate useful insights, but without a shared system of execution, these insights often could not be utilized by the organization as a whole.

They needed a way to close the gap between revenue strategy and what actually happened in accounts, opportunities, coaching conversations, and seller behavior.

Altify helped ICE Mortgage Technology close that Execution Gap.

The challenge: moving from adoption to execution

By early 2026, ICE Mortgage Technology had already made meaningful progress with Altify. The platform was live. Account planning had organizational attention. Sellers understood that strategic selling was part of the job. Renewed leadership momentum, including Bob Hart stepping into the President role, gave the initiative stronger executive sponsorship and a timely reason to re-engage the organization.

But adoption was only the first milestone.

The bigger opportunity was to move from "we have the platform" to "this is how we run strategic revenue execution."

That required more than training. ICE Mortgage Technology needed to reinforce ownership, improve coaching rhythms, make collaboration more intentional, and ensure Salesforce reflected real account strategy rather than only administrative updates.

Altify became the Salesforce-native execution layer that helped bring those elements together.

Instead of creating another place for sellers to document work, Altify helped connect account strategy, stakeholder intelligence, opportunity risk, coaching, collaboration, and AI-guided next actions in the system where revenue teams already worked.

The real gap was ownership

ICE Mortgage Technology had done many of the right things. They took a playbook from their own professional services team and deployed a change management strategy that is used in their own client implementations. The team created awareness before launch, delivered training, followed up with sellers, and built enough momentum to make account planning part of the conversation. But as the organization looked at what was working and what still needed improvement, one truth became clear: Adoption does not stick just because people know which buttons to click.

Long-tenured reps needed a reason to change. Sellers needed practice applying Altify to real deals. Managers needed a consistent coaching motion. Cross-functional contributors needed clarity on who owned what across Sales, Solution Engineering, Customer Success, Relationship Management, managers, and leadership.

Altify helped them move from informal expectations to clearer execution roles.

Sales could own account and opportunity strategy. Solution Engineering could contribute technical fit and solution risk. Customer Success and Relationship Management could bring customer health, adoption, and relationship context. Managers could coach execution instead of chasing updates. Leadership could inspect and coach the quality of strategy, not just pipeline numbers.

That shift changed the role of Altify within ICE Mortgage Technology.

It was no longer simply a tool sellers were expected to use. It became a shared operating model for how ICE Mortgage aligned around strategic accounts and opportunities the entire organization can rally around and leverage.

Account planning became a team sport

Strategic accounts are not won by lone-wolf selling.

They require coordinated execution across people who each understand a different part of the customer. While, Sales sees the commercial path. Solution Engineering sees technical fit and implementation risk, Customer Success and Relationship Management understand relationship health, adoption, and customer context. At the same time, Managers see coaching opportunities, and leaders see strategic priorities and patterns across the business.

Altify gave those teams one shared place to align around customer goals, business pressures, key initiatives, stakeholder influence, relationship gaps, whitespace, expansion opportunities, risks, obstacles, and next actions.

The result was not more documentation. It was better coordination.

Teams could pressure-test account strategy, identify missing stakeholders, challenge assumptions, connect customer insight to revenue action, and leave meetings with clearer ownership. In practice, that meant fewer unclear handoffs, fewer "who owns this?" moments, and more disciplined teamwork around the accounts and opportunities that mattered most.

Managers moved from pipeline inspection to execution coaching

Pipeline reviews should improve deals. Too often, they simply report on them.

For ICE Mortgage Technology's managers, Altify created a structure for more productive coaching conversations. Instead of spending review time asking for updates that should already be visible in Salesforce, managers could focus on the questions that improve execution:

- **Where is the deal vulnerable?**
- **Which stakeholders are missing?**
- **Is the customer problem compelling enough?**
- **What does the decision process tell us?**
- **What action would improve our position this week?**
- **What resources we need to tap to drive success?**

Altify helped managers coach to methodology, relationship strength, opportunity risk, and execution quality. Reviews became less about whether fields were complete and more about whether the team had a credible strategy to win.

That mattered because methodology creates value only when it is applied inside real deals, with real stakeholders, real blockers, and real pressure.

Altify helped make coaching part of the operating rhythm rather than an occasional activity dependent on individual manager style.

Enablement moved closer to live deal execution

One of ICE Mortgage Technology's clearest insights was that training does not equal ability.

A seller can understand how to complete an account plan and still struggle to use that plan to advance a live opportunity. A team can attend methodology training and still revert to old habits when the quarter gets intense.

So the conversation shifted from platform knowledge to execution behavior. Instead of asking, "Do people know how to use Altify?" they began asking, "What is getting in the way of better deal execution?"

That shift opened the door for more targeted enablement: live deal labs, role-specific account planning sessions, strategic account workshops, manager-led coaching routines, and test-and-improve reviews tied to actual seller behavior.

Altify helped enablement move from classroom learning to behavior change inside real revenue moments. Participation was no longer the goal. Better execution was.

Collaboration became operational, not accidental

ICE Mortgage Technology also recognized that collaboration does not happen just because smart people are invited to the same meeting. Rather, it has to be designed, practiced, and reinforced.

Altify gave them a collaboration backbone for strategic account work. Teams had a shared environment to inspect strategy, expose gaps, align on next actions, and track progress against account priorities. That changed the purpose of collaboration.

It was no longer just about getting more people into the conversation. It was about making the conversation more useful. The best meetings became the ones where teams did not simply report what had happened. They improved what would happen next.

AI became more useful when connected to execution

ICE Mortgage saw the opportunity in AI, but also understood the risk. More insight does not automatically create better execution.

In a complex revenue environment, AI can help teams think faster, summarize information, surface risks, and suggest next steps. But if AI-generated insight stays trapped in chats, documents, one-off summaries, or individual seller workflows, it becomes difficult to scale, coach, inspect, or turn into accountable action.

Altify is giving AI-assisted thinking somewhere to land.It connected AI-generated insight to account plans, stakeholder maps, opportunity strategy, coaching prompts, Salesforce data, human judgment, and next actions. At the same time AI provides an opportunity to convert unstructured data into structured data that is captured from meeting notes, emails, and interactions from events reducing the friction of capturing that information into Altify and the applicable Saleforce records. Accelerating their ability to leverage that valuable information that the entire organization could leverage.

That distinction mattered.

AI could surface what might matter. Altify helped teams decide what to do next.

AI could support strategic thinking. Altify helped turn that thinking into visible, accountable execution.

AI supports organization wide collaboration. Altify helps them leverage that information across the organization.

For ICE Mortgage Technology, AI was not a side project. It became more valuable when connected to a disciplined revenue operating model

The result: a clearer operating model for Strategic Revenue Execution

With Altify, ICE Mortgage Technology moved beyond account planning adoption and toward a more durable rhythm for Strategic Revenue Execution.

The team was able to focus on five connected execution plays:

1. Define what good execution looks like across account strategy, opportunity planning, stakeholder engagement, risk management, and next actions.
2. Embed strategy into Salesforce so account planning and opportunity execution live where sellers already work.
3. Reinforce ownership and accountability across Sales, Solution Engineering, Customer Success, Relationship Management, managers, and leadership.
4. Fourth, turn managers into execution coaches by making deal reviews more focused on risk, relationships, qualification, and action.
5. Use AI to guide action, not just generate insight, by connecting AI-assisted thinking to the execution workflow.

Together, those plays helped ICE Mortgage Technology turn account planning from a platform activity into a business discipline.

See Altify in Action

"Altify didn't just give us a place to document strategy — it gave our teams a reason to use it. Our managers coach differently now, our cross-functional teams know who owns what, and the insights we're generating actually turn into action inside the accounts that can be used to better service our clients and drive value."

Eric Kujala,
ICE Mortgage Technology

Altify is the Salesforce-native platform for Strategic Revenue Execution.

We help enterprise revenue teams close the Execution Gap between strategy and results by embedding account planning, deal execution, and AI-guided coaching directly inside Salesforce.

The result: sellers focus on the right opportunities, managers coach with insight, and leaders gain the visibility needed to forecast with confidence and drive predictable growth.

See how Altify transforms the way the world sells at altify.com.