

MeridianLink Brings Strategic Selling to Life with Altify



Like many enterprise sales organizations, **MeridianLink** faced the Execution Gap—the disconnect between strategy and what actually happens in the field. They strengthened their sales execution by embedding Altify within Salesforce, creating a unified system for account planning and deal management. Fragmented processes were replaced with a shared framework for qualifying opportunities, aligning teams, and advancing complex deals. The result is clearer priorities, stronger collaboration, and a more disciplined approach to winning higher-value opportunities and driving predictable growth.

INDUSTRY

Financial Services Tech

COMPANY

MeridianLink
Costa Mesa, California,
United States

meridianlink.com

MeridianLink provides cloud-based software that helps banks and credit unions modernize lending, streamline account opening, and deliver better digital customer experiences.

A Clearer Way to Sell, Together

MeridianLink is a leading provider of cloud-based software that enables banks and credit unions to modernize their lending, streamline account opening, and deliver faster, more seamless digital experiences to their customers.

But as the business scaled, sales execution didn't always scale with it. Account plans lived in different places. Deal reviews focused on updates instead of outcomes. And teams lacked a consistent way to move complex opportunities from strategy to close.

While Salesforce provided data visibility, it was Altify that transformed how MeridianLink executes—turning data into structured action, aligned decisions, and repeatable wins, across account planning and deal execution. The result is a shared sales language, clearer priorities, and more confidence in how deals get done.

The Challenge: Too Much Effort, Not Enough Clarity

MeridianLink's sales organization had the right people and strong customer relationships—but execution varied. Sellers approached opportunities differently; account planning wasn't consistent, and collaboration across teams took extra effort.

Without a shared framework, deal reviews often became debates about status instead of conversations about risk, alignment, and next best actions. MeridianLink needed a way to simplify selling, bring teams together, and help sellers focus on the details that actually move deals forward.

The Solution: One Account Planning System, Built on Salesforce

From CRM Visibility to Execution Discipline

MeridianLink established Salesforce as the system of record — and embedded Altify as the system of execution. Instead of simply tracking opportunities, the business now operates with a structured, repeatable approach to account planning and deal advancement. Altify transforms CRM data into guided action, bringing discipline, alignment, and clarity to how complex deals are won.

A Shared Methodology with Target Account Selling (TAS)

Altify introduced a structured approach to strategic selling, enabling MeridianLink to consistently qualify, align, and advance complex opportunities. Whether teams are pursuing new logos or expanding existing accounts, everyone works from the same playbook—making it easier to scale what works.

A Single Hub for Revenue Collaboration

With Altify, sales, customer success, sales engineering, product marketing, finance, and leadership all collaborate in one place using a central, account-based approach. Accounts and opportunities are visible to everyone who matters, so teams can quickly spot risk, align resources, and stay focused on the deals that matter most.

Better Deal Reviews, Stronger Confidence

Altify's "Test and Improve" deal reviews push teams beyond surface-level forecasts. Sellers and leaders regularly pressure-test assumptions, identify gaps, and assess execution readiness. That structure brings clarity to every opportunity—and confidence in what's real and actionable strategy to what still needs work.

Changing Seller Behavior, Improving Results

With Altify in place, MeridianLink sellers spend less time talking about deal status and more time having meaningful, strategic conversations with customers. Altify brings focus to the priorities that drive each account forward, reinforcing disciplined selling and elevating deal quality.

That shift has driven real impact:

- ✓ **99% account plan coverage, a 50% year-over-year increase**
- ✓ **More unified and consistent execution across teams**
- ✓ **Less admin 'busy' work and more time spent selling**

The Results: Better Deals, Higher Value, Faster Progress

Stronger Qualification, Bigger Wins

With shared visibility into the buying process, MeridianLink identifies risk earlier and qualifies deals with greater discipline. Today, **75% of new consumer and mortgage wins** use a formal opportunity plan—resulting in a **30% increase in average selling price** by focusing on higher-value outcomes.

Alignment from Sellers to Leadership

Everyone—from frontline sellers to executive leadership—now sees deals the same way. Clear execution guidance and structured reviews make coaching more effective and help deals move forward with fewer surprises.

Strategic Revenue Execution Guided by Altify

Altify doesn't just surface insights—it actively guides execution. It identifies gaps in stakeholder alignment, flags risk before it impacts outcomes and recommends the next best actions to move deals forward. Managers coach with confidence, and sellers stay focused on advancing deals and building customer alignment.

For MeridianLink, that means fewer late-stage surprises. If an opportunity looks strong on the surface but lacks executive sponsorship or broad stakeholder alignment, Altify brings that risk to light early. Instead of finding out something's missing at the end of the quarter, managers and sellers address it in real time—strengthening relationships, validating business value, and tightening execution while there's still time to act.

The conversation shifts from "What's the status?" to "What do we need to win?" And that clarity makes all the difference.

"The synergy between Salesforce and Altify as our sales execution is non-negotiable. This integrated platform replaces inconsistent execution with the structure and clarity we need to focus on winning deals. It's how we supercharge our strategic selling and ensure predictable revenue growth."



Richard Scheig,
Chief Revenue Officer,
MeridianLink



What's Next: AI-Enabled Execution

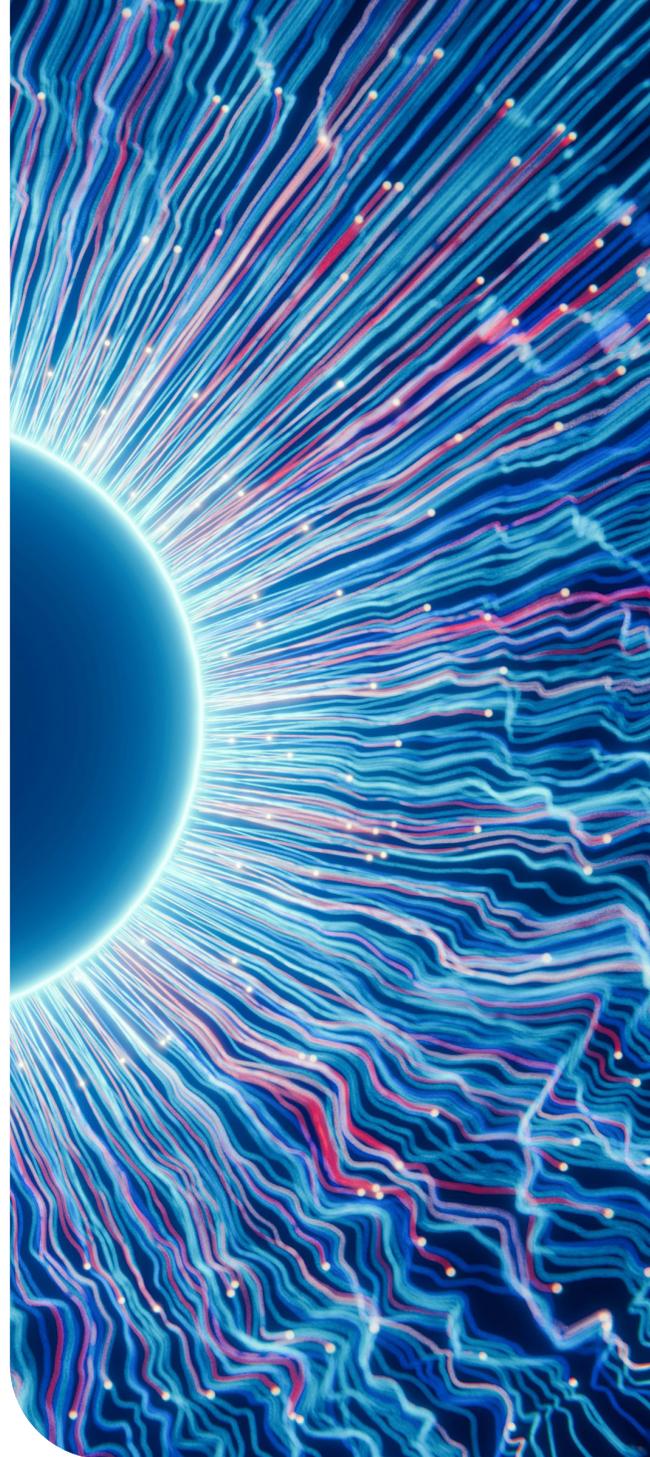
MeridianLink is exploring how Altify MaxAI and Agentforce can further reduce manual work in territory and account planning. By surfacing insights proactively and minimizing data entry, the team is removing friction from the sales process— so sellers can devote more time to customers, collaboration, and closing high-value opportunities.

Next Steps

Ready to see how Altify can help your team turn strategy into execution?

Altify helps revenue teams improve collaboration, strengthen customer relationships, and turn sales plans into measurable growth.

[See Altify in Action](#)



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.