



How One of the Fastest-Growing Data Security Platforms Boosted Technical Win Rate by 20% With Opine

This three-time Redpoint InfraRed 100 winner partnered with Opine to build a scalable POC motion that drives effortless collaboration across SE, AE, and CX teams.

"Opine gave us a structured path to stronger POCs, and our technical win rates have never been higher. It's the perfect SE companion."

— VP of Sales Engineering

Curated by the Opine team

THE PROBLEM

Siloed POC workflows slowed a rapidly growing sales organization

Since its inception, this leading data security platform has established a strong enterprise footprint and a healthy pipeline. The problem? Despite the platform's rapid growth, its SE team was still managing POC plans and progress out of spreadsheets.

To create a POC plan, each SE had to start from scratch in a new file—customizing success criteria, outlining validation steps, and defining ownership details—before emailing it to the customer. As more deals entered the evaluation stage, this manual workflow became an increasingly heavy slog that ate up SE bandwidth and lengthened turnaround times for customers.

The challenges didn't stop at POC creation: the most daunting blocker was tracking progress after kickoff. Presales would lose hours updating manual trackers with the use cases they'd tried and outcomes they'd achieved. Plus, with each SE running several POCs simultaneously, updates from the latest customer calls, Slack threads, and Jira tickets often remained tribal knowledge, never making it to the official system of record.

Leadership felt the sting as well. Whenever the VP of Sales Engineering needed the status of a POC, he had to chase down SEs over Slack and wait for a response. "SEs are often heads-down in technical work and unable to respond right away," he explains. "But when revenue is on the line, and the executive team wants answers, that wait can be costly."

Even when leaders did get status updates, they were only on a deal-by-deal basis. Without visibility into success criteria across the pipeline, there was no way to fine-tune POC processes and meaningfully move technical win rates.

To break down these knowledge silos and unlock the true value of its pipeline, the company required an AI-first technical presales platform with end-to-end POC orchestration. When the team evaluated [Opine](#), whose own POC process was a masterclass, they knew they'd found just what they were looking for.

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*Context switching is one of the biggest challenges for SEs ever. Opine's ability to rapidly organize
We had little to no real visibility into how POCs were progressing. As our deal count multiplied, we realized we needed a tool to combine and standardize scattered SE knowledge.*



THE SOLUTION

Solidifying teamwide visibility and technical success with Opine

"Opine doesn't just save our SEs hours of time gathering context and creating POC plans. It makes the process easier for everyone—from AEs and leadership to our customers."



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Onboarding was fast and collaborative. The Opine team built rich and native integrations with Salesforce, Slack, Chorus, Jira, and Google Calendar, ensuring everything seamlessly worked with the company's tech stack. Within 30 days, the entire SE team was executing smooth, structured POC workflows.

Today, SEs don't have to create evaluation plans from scratch. Using Opine's best-practice templates, the presales team quickly built out a library of plans catered to different segments and deal sizes that they now just rinse and repeat.

Even better? After making a few, deal-specific tweaks, SEs send these templates directly to prospects via a structured, buyer-facing portal. In this portal, the customers can check progress, comment on tasks, and even rate success criteria against expectations.

This streamlined POC workflow not only dramatically reduces setup time for SEs but makes the experience much smoother for customers. "Our presales process is now a true differentiator for us," the VP of Sales Engineering explains. "When customers are actually following what's going on and engaging, evaluations move faster and end in more wins."



Once these plans are shared, Opine keeps a real-time record of how they're going. It gathers context from every crucial data source—Slack threads, call notes, Jira tickets, CRM opportunity fields—and turns what used to live primarily in SEs' heads into a unified, codified view of every deal.

While Opine's views include high-level details like pipeline metrics and AI-generated deal summaries, SEs also use the platform for a more granular picture of the POCs themselves. They can see use cases tested, outcomes validated, and any blockers standing between them and a technical win. Plus, if an SE has any specific POC questions that Opine hasn't answered, they can take them directly to the platform's AI assistant.



With Opine automating deal tracking, leadership enjoys a front-row seat to every revenue-critical development. Beyond delivering individual POC updates, Opine also gives these leaders an aggregated view of POC performance, surfacing success criteria across evaluations to show how many times they were used and how often they met, exceeded, or failed buyer expectations. With this intel, leaders know exactly which use cases they should double down on to boost technical win rates and protect revenue.

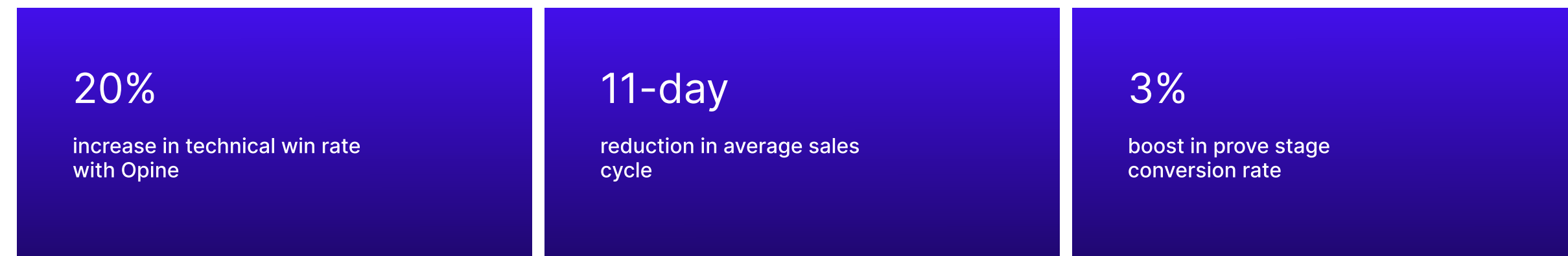
The visibility gains extend beyond the presales team. AEs also use Opine's collaborator licenses to pull instant updates on POC status and take the next steps without having to go back and forth with SEs. Then, once a deal is marked "closed-won," the company's CX team syncs data from Opine directly into their post-sales tool. With this context to guide them, they have everything they need to translate that presales momentum into a lasting partnership.

THE RESULTS

Higher technical win rates, accelerated sales cycles, and a single source of truth for POC progress

With Opine, the data security platform leveled up its presales motion to move at the pace of its booming pipeline. With SEs, AEs, and leadership all plugged into the same view of every deal, POCs move faster, technical win rates are significantly higher, and sales cycles are much shorter.

The results say it all:



What's next? The company is already planning to build AI agents that can query and update deal information in Opine—further streamlining presales workflows. Over time, these agents will handle all routine work, so SEs can focus entirely on running the highest-quality evaluations.