



# How Orca Security Boosted Overall Win Rate by 11% With Opine

Orca is an award-winning cloud security platform that partnered with Opine to streamline deal execution, sharpen forecast confidence, and convert more opportunities into bottom-line revenue.

*"I've used countless presales tools over the years, and I can confirm that not a single one comes close to what Opine is doing. Because of their platform, win rates are up, SEs are more efficient, and leadership has access to never-before-seen pipeline intelligence. It's amazing."*

- Shaun Dolan

*Director of Solutions Engineering at Orca Security*

Curated by the Opine & Orca Security teams



# Orca Security

Industry Software • Pain point Consolidating scattered presales intelligence across a high volume of deals

 11%

boost in overall win rate

 14%

lift in technical win rate

## About the Company

Orca Security is the pioneer of agentless cloud security, enabling organizations to eliminate complexities, vulnerabilities, and risks, even those introduced by AI. Trusted by hundreds of organizations, including SAP, Gannett, Autodesk, and Lemonade, Orca has earned industry recognition on prestigious lists, such as Notable Capital's Rising in Cyber List and CRN's 100 Coolest Cloud Computing Companies.



## THE PROBLEM

# Consolidating scattered presales intelligence across a high volume of deals

As a market-leading cybersecurity company with dozens of deals in motion at once, Orca runs a tight presales ship. However, when [Shaun Dolan](#) joined as Director of Solutions Engineering, he realized the team's current presales software was creating bottlenecks that actively jeopardized pipeline.

While the platform promised to streamline deal admin, it still required SEs to enter every update manually. Shaun's team spent hours changing statuses, logging follow-up tasks, and cross-referencing calls, Salesforce records, and Slack threads to find and input the latest opportunity context. With each SE juggling over 20 POCs across all these tools, it wasn't feasible to keep the records current for the AEs who relied on them.

Leadership also felt the strain. When Shaun couldn't easily see where all deals stood before a forecast meeting, he'd have to individually chase down every SE with a long list of questions about blockers and next steps. "I can't protect revenue if I don't know which opportunities are at risk," he explains. "But my team was working so hard building solutions for customers that I hated hitting them with extra admin."

Low visibility into deal health wasn't the only limitation Shaun and other leaders faced. They also had no way to access the high-level pipeline intelligence needed to proactively identify what was driving wins or losses. Without this visibility, they couldn't answer pressing questions, such as which bugs and feature requests were blocking the most revenue or whether spending too long in certain deal stages was costing Orca opportunities. Even calculating win rates was a subjective process that yielded different results depending on who did the math.

To regain deal visibility and buy SEs some breathing room, Shaun evaluated multiple new and incumbent presales platforms. However, only [Opine's](#) AI-first technical sales platform offered the automated SE workflows and executive-level pipeline dashboards he needed to right the ship.

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*Presales teams are expected to be everywhere at once. Zoom, Chorus, Slack, Salesforce, the list goes on. We needed a tool that could pull context from all those places, analyze it, then tell us exactly what actions to take.*



THE SOLUTION

# One AI-native workspace to drive repeatable technical success

*"The Opine team really listened to all our feedback throughout the process and rolled up their sleeves to action it."*



## THE SOLUTION

# One AI-native workspace to drive repeatable technical success

To kick off the partnership, the Opine team stood up rich integrations with Orca's Salesforce, Chorus, Slack, and Google Calendar, completing each in minutes. Then, they worked with Shaun to configure customized pipeline views tailored to how Orca's leadership team tracks deals.

"Onboarding was so smooth," he shares. "The Opine team really listened to all our feedback throughout the process and rolled up their sleeves to action it."

Within a day, Shaun's team was already generating live deal intelligence. A month later, every Orca SE was outsourcing the bulk of their admin to Opine.

**Deal admin on autopilot** -For the first time, Shaun's SEs could consolidate all customer context into a single source of truth for every deal. Within Opine, statuses update in real time, pipeline metrics surface automatically, and AI-generated overviews sum it all up. The only manual step SEs have to take is accepting Opine's AI-assisted opportunity field inputs, which automatically sync back to Salesforce.

According to Shaun, the team doesn't just save valuable time by automating admin; they stay more accountable to prospects. When the platform ingests a call or Slack thread, it converts any follow-up commitments—like a requested white paper or technical overview—into a clear task that appears in each SE's individual workbench. "Opine gives my team the workflows and insights to escape the usual mundane busywork and really focus on our customers," he adds.



### ■ Pipeline intelligence for the entire organization

SE efficiency gains have also rippled through the organization, benefitting AEs, leadership, and RevOps alike. While AEs turn to Opine for granular deal tracking, Shaun and RevOps leaders use it to forecast more confidently. In addition to zooming in on individual opportunities, they can access a sweeping snapshot of Orca's entire pipeline, filtered by deal size. This view would've been impossible to achieve in the past, even with perfect deal hygiene.

But the benefits run deeper than sharper forecasts. Leaders now use Opine to spot patterns across deals and systematically improve win rates. For example, Shaun can:

- Consult the "Requests" dashboard to see how many deals each product gap is blocking and exactly how much pipeline is at stake, then communicate those priorities to the product team
- Instantly access accurate calculations of funnel conversion rates, broken down by stage
- See how much time his team spends in each deal phase, benchmarked against closed-won deals, and swiftly eliminate bottlenecks

■ Orca's customer success team is starting to get in on the action as well. They coordinated with Shaun's team to create a template for post-sales handoff documents and can now generate new ones in Opine with a single click. Armed with this comprehensive POC context, CSMs confidently run point in kickoffs, safeguarding the trust that presales worked so hard to build.

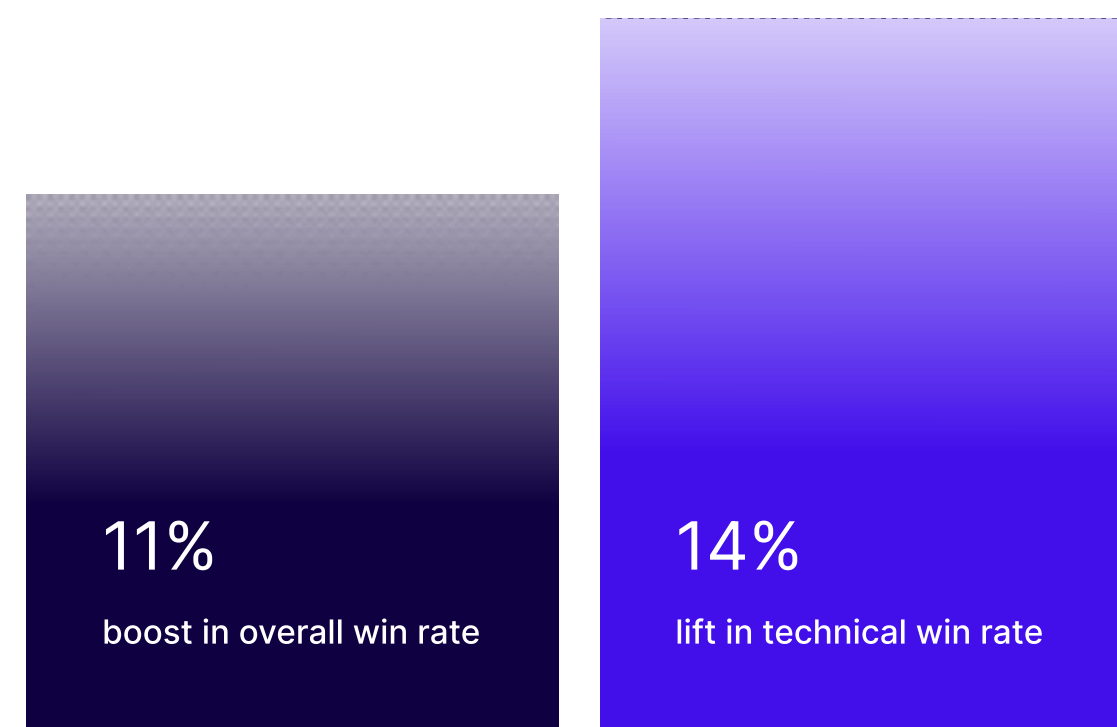
"Opine quickly became our single source of truth for all opportunities, guiding and coaching us in ways our previous platform never could. It's about as close to a magic wand as you can get."

## THE RESULTS

# Stronger cross-functional collaboration, higher win rates, and a scalable presales motion

Opine empowered Orca to transform its presales motion from a reactive manual scramble into a streamlined, proactive process. With SEs automating deal admin and everyone from presales to leadership working from the same source of truth, sales cycles are shorter, and win rates are substantially higher.

The results say it all:



What's next?

Shaun is eager to keep growing with the Opine team, whose product roadmap continues to evolve at a rapid clip. He's especially excited to test out Opine's AI agents, which will enable Orca's SEs to automate even more of their core workflows, while still leveraging customer-specific deal context.

“Opine’s entire team is top-notch. They turn around our requests so fast and genuinely make everything so easy for us. Given the strides they’ve already made against incumbents, I can only imagine what else they’ve got up their sleeve”

**Shaun Dolan**

Director of Solutions Engineering at Orca Security



Ready to experience what your presales has been missing? See what Opine can do for you in 30 minutes or less.

Book a Demo - <https://tryopine.com/demo>