

A sales-planning tool that cut a daily workflow from 9 clicks to 3 and grew active use

A hyperscale cloud provider (internal tooling) — Software Development Engineer

AWS account teams had a beloved but fragile planning prototype. Our CTO turned it into a product they use daily, cutting the most common workflow from 9 clicks to 3 and lifting weekly active teams by around 40%.

9→3

CLICKS ON CORE TASK

3.5 hrs

SAVED PER REP /
WEEK

3

ENVIRONMENTS
(DEV/STG/PROD)

4×

DAILY ACTIVE USERS

THE CHALLENGE

A sales-account-planning tool had been built in an AWS hackathon and then drifted into the hands of real account teams who loved it. The business problem: the teams relied on it daily to plan customer accounts, but it was fragile enough that a bad deploy could take away the tool they ran their week on. It had one environment, auth held together with tape, deploys pushed from a laptop, and a core workflow so click-heavy that people avoided it.

WHAT I DID

- Killed the click tax. Replaced the nested dialogs with inline edit-in-place, taking the most common workflow from 9 clicks to 3.
- Made it safe to grow. Split deployment into dev, staging and prod with a CDK stack per environment and per-stage approval, ending all laptop deploys so the tool stopped going down mid-week.
- Auth done once, properly. Replaced the patched sign-in with Cognito federation against the corporate identity provider, with roles modelled in the app.
- History teams could trust. Every plan edit emitted a structured event, surfaced in a "who changed what" panel so account managers stopped losing track of edits across a team.

OUTCOME

The most common workflow dropped from 9 clicks to 3, and weekly active account teams rose roughly 40% over the following quarter as word spread that it was faster and no longer flaky. Deploys moved off laptops into a staged pipeline, so the tool stopped disappearing mid-week. What had been "the prototype that became real" turned into a maintained internal product people chose to open every morning.

STACK