

Case Study - AB Tasty

## AB Tasty leverages Surfe's features to improve data hygiene and transparency within the sales team

Understanding the consumer journey is a critical aspect of doing business, because the experience that a user has when interacting with a website or product can make or break a sale or even shape a brand's image. There's no one-size-fits-all solution or magic lifehack to succeed in getting consumers from A to B, but the right recipe can be found through experimentation.

AB Tasty offers data-driven testing, personalization, and product optimization platforms to help companies create a seamless customer journey. The platform revolutionizes experiences, driving growth across multiple touchpoints and digital channels.

With AB Tasty, companies can also easily update their processes and deploy the outcomes of their experiments.

Alisha Woodward, CRO Specialist at AB Tasty, shared how Surfe has been able to improve their team's CRM experience.

### Challenge 1

**A gap between LinkedIn and the CRM made the data transfer process susceptible to missing information and disarray**

Before Surfe, AB Tasty's teams utilized a toolbox that was built in-house and connected LinkedIn to Salesforce. Although the tool successfully brought their CRM to the social network's interface, it wasn't completely dynamic. Contact updates and conversation logging were not available with the AB Tasty toolbox, meaning that it didn't fully eliminate manual processes.

Another complication was the inability to differentiate between "contacts" or "leads" when adding people to Salesforce.

All prospects were being added as "contacts" and would then have to be qualified and identified as business opportunities later on. This led to a messy database, an unwieldy sales funnel, and the sales team's growing frustration.

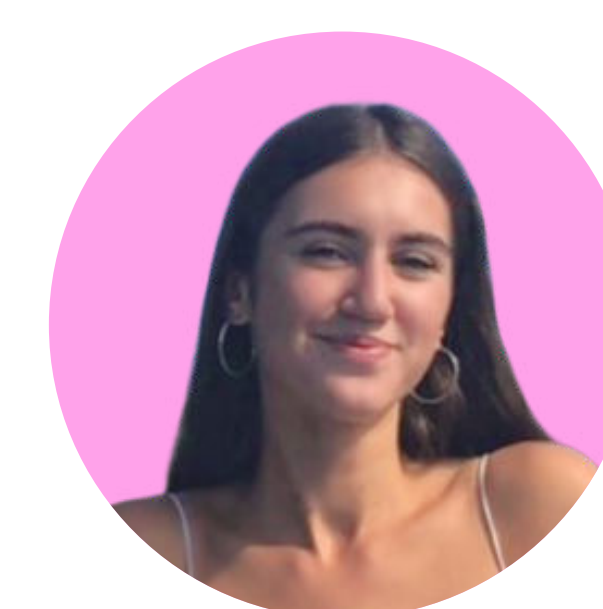
### Solution 1

**Surfe improves lead qualification while keeping data consistent and complete**

When AB Tasty's team started using Surfe, they noticed that the structure of their CRM became clearer and the sales process - smoother.

#### Company overview

- Founded in 2009.
- Headquartered in Paris, France.
- 270+ employees.
- AB Tasty is a global provider of customer experience optimization software.
- Clients include Panasonic, Fenty, Lush, Eurosport, Sephora, Papa John's, Allianz, etc.



Alisha Woodward,  
CRO Specialist  
at AB Tasty

**“With Surfe, we transformed the way we qualify the person we add to Salesforce.”**



SDR's are now able to send contacts to Salesforce as either "contacts" or "leads", and their segmentation can be managed directly from the LinkedIn interface, ultimately streamlining the lead qualification process.

"We can add someone as a lead, knowing this is the right person to go after." - Alisha Woodward, CRO Specialist at AB Tasty.

Thanks to this differentiation, the "contacts" database does not get flooded with records and remains clean.

On top of that, Surfe gives AB Tasty the opportunity to enrich missing contact information in a matter of seconds. Alisha shared that she felt more confident going after leads knowing she was equipped with several tools that would help her fetch the right contacts.

## Challenge 2

### **Manual data entry hampers sales productivity and puts data accuracy at risk**

Prior to switching to Surfe, SDRs had to keep track of their activity by manually inputting information to Salesforce. They noticed it took quite some time and also piled up additional, daunting work for admins.

Furthermore, copying and pasting information from LinkedIn to the CRM meant data could get lost along the way. Logging conversations with prospects was a lengthy process that required time and energy, but one that was also necessary for documentation.

## Solution 2

### **Clarity within the team and CRM data hygiene ensured**

Surfe simplifies the relationship sales reps have with the CRM by taking over processes that were previously performed manually.

The "Update CRM" from a LinkedIn profile functionality gives AB Tasty's team peace of mind, knowing that they don't have to go through additional admin tasks. It also leaves no room for error by replacing the cumbersome copy and paste with synchronization to keep data consistent.

Because SDRs can synchronize LinkedIn conversations with Salesforce in one click, they don't have to log messages manually anymore.

Surfe also makes it easier for team leaders to track reps' activity given that their efforts are reflected in Salesforce. This transparency puts team members at ease and allows them to focus on relationships with clients.

Statistic from June 2021



## 155h+

saved monthly by the team



## 3,550+

leads added to Salesforce since implementing Surfe



## 100%

accurate CRM data

Looking to optimize your customer experience?  
Discover [AB Tasty](#).

Need a tool that will transfer LinkedIn data to your CRM and keep it consistent? Talk to one of our experts at [hello@surfe.com](mailto:hello@surfe.com).