

Case Study

How Surfe helped RHR international consultants follow their prospects anywhere they go, with the 1-click profile update feature.

Focus on selling your business, Surfe will do the rest.

RHR International is a global firm of organizational management consultants and consultants whose ultimate mission is to help senior executives of companies all around the world transform themselves and, by extension, their organizations.

RHR believes in shaping leaders, who in turn shape the world.

What differentiates RHR International from its competitors is its sophisticated assessment method to generate key insights and devise a strategy that's been tailored specifically to meet a given client's needs and goals.

We had the opportunity to sit down with **Ariell Heacox, Project Coordinator at RHR International**, about how Surfe has helped consultants better nurture relationships with clients.

She initially discovered Surfe in the Copper marketplace and found it to be very simple but powerful and useful, leading her to roll out Surfe to the rest of the consultants on the team.

Company Overview

- Global headquarters in Chicago, Illinois
- 75-year history
- B2B customers
- International reach: Serves clients in Europe, North America, South America, Asia and Australia
- Provided services to executives from companies such as McDonald's, Aribnb, Abercrombie & Fitch, Target and Mastercard

Challenge

Contact loss when executives change jobs as these changes are not reflected on the CRM.

The **Ideal clients** for RHR International include senior executives from multinational corporations, Board of Directors of Fortune 500 companies and other **high-level executives**.

In RHR International, the consultants are not only responsible for advising the clients but they are also in charge of prospecting/managing accounts; meaning that **they engage in the "do-er" & "seller" model**.

For consultants, it's essential to use LinkedIn and the CRM (Copper, in this case) to **create and maintain client relationships**, especially considering the high value of the clients RHR works with.

RHR measures the effectiveness of a given consulting session by looking at how often clients return for more services. It has indeed achieved

a **very high retention rate of 93% in the past 18 months**, meaning that RHR consultants have given exemplary service to clients that makes them want to come back. This also means that RHR International consultants have an **opportunity to re-offer their services** to satisfied customers time after time.

However this does come with challenges.

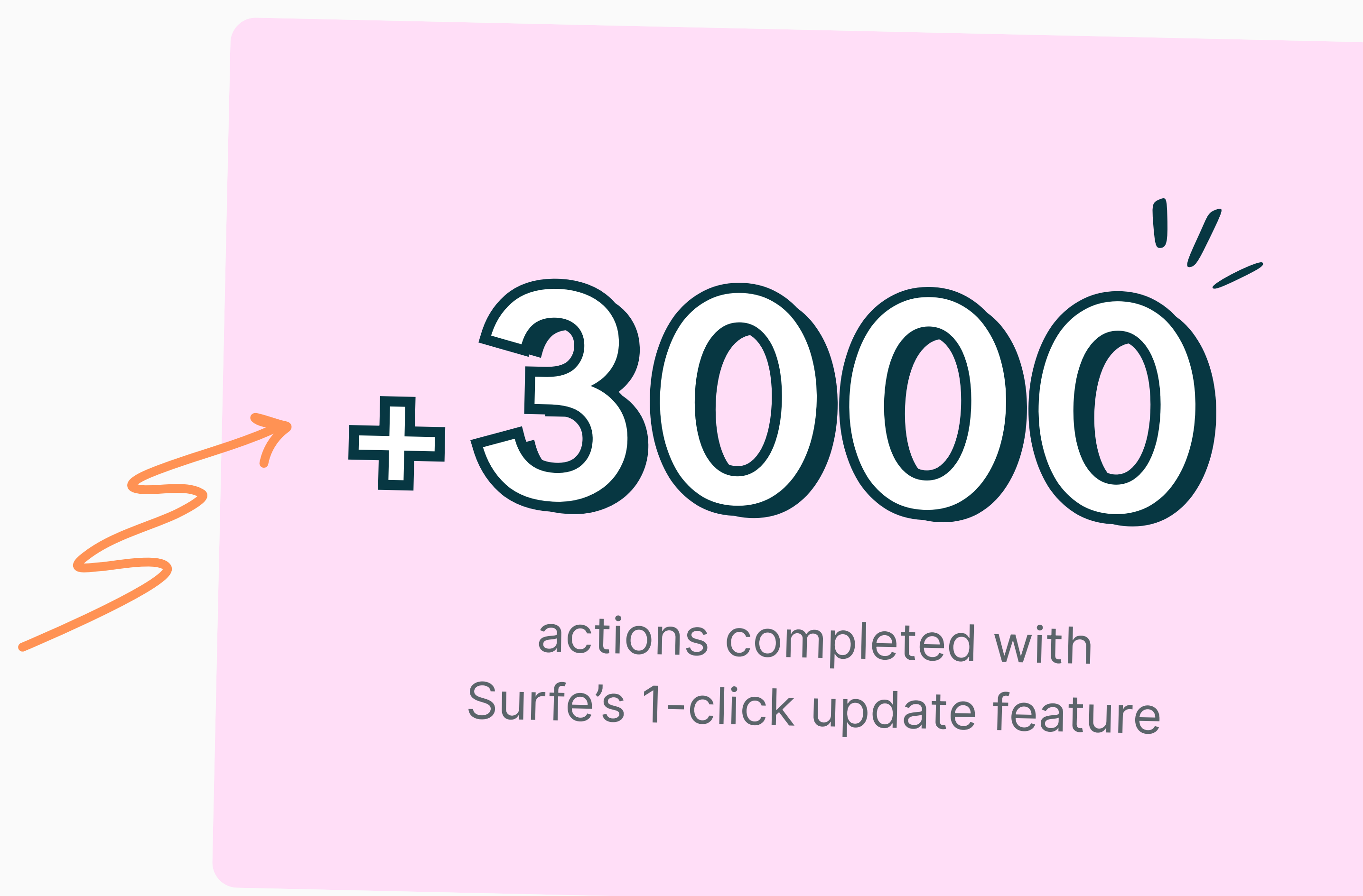
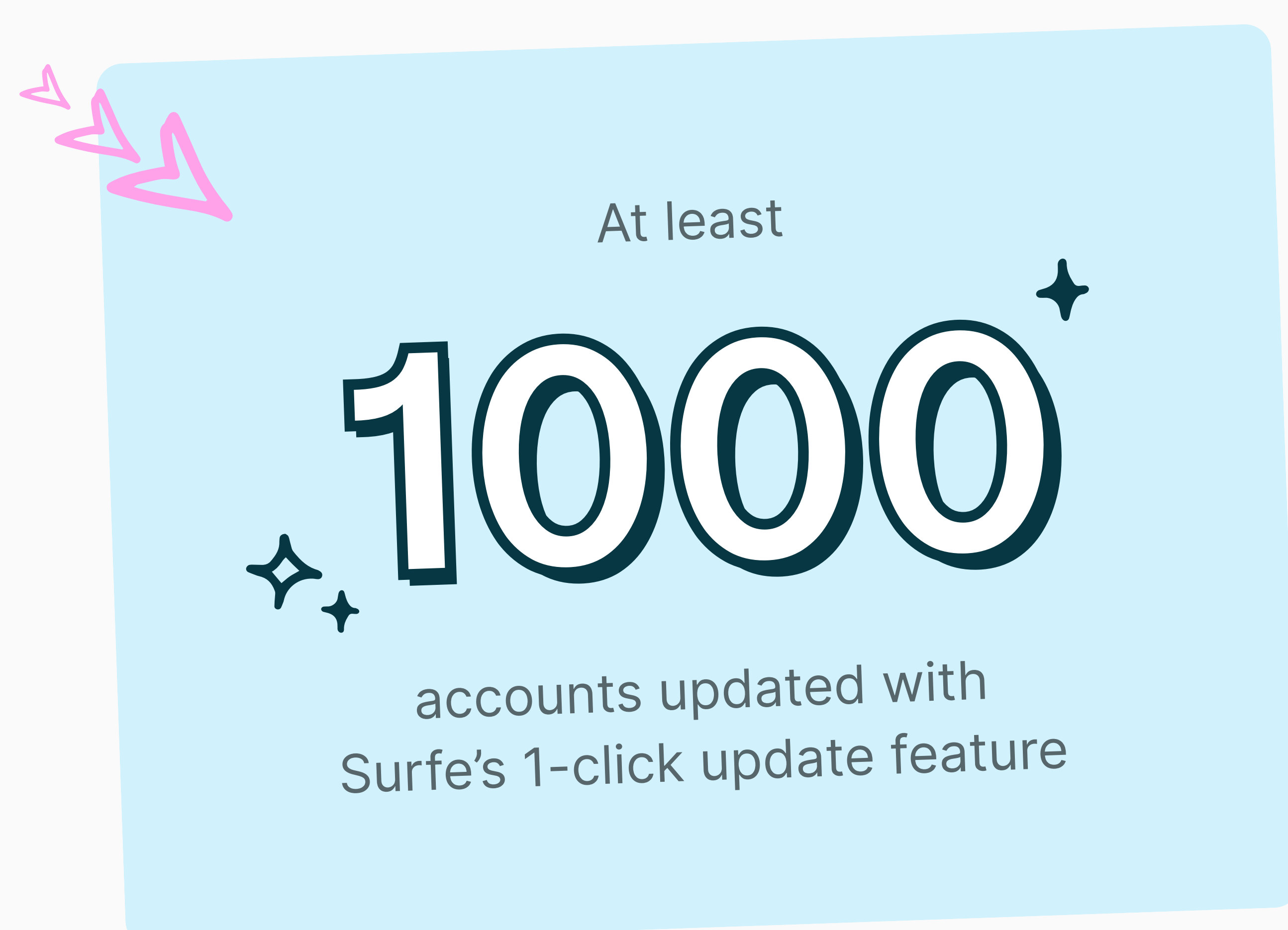
The executive community is a small but active one. Due to their unique competence, these people are in **high demand**, and **can very quickly hop to another company** in either the same role or even a more senior one.

When this happens, it's easy for clients - and their wealth of knowledge - to **get lost in the shuffle and slip through the cracks**, as their old company email/phone number is no longer valid & cannot be contacted.

It is common that when individuals move companies, they would change their LinkedIn profile, but these changes aren't reflected in a CRM. When this situation happens, it's less than ideal for RHR, because it means a contact loss despite their services and input are still relevant even as an executive changes companies.

But, in order to keep track of them, consultants - who are already doing more than one job - need to track down new email addresses, as those from a previous company would give a bounceback email. Then, consultants have to update information such as job title, company & the new contact details in the CRM.

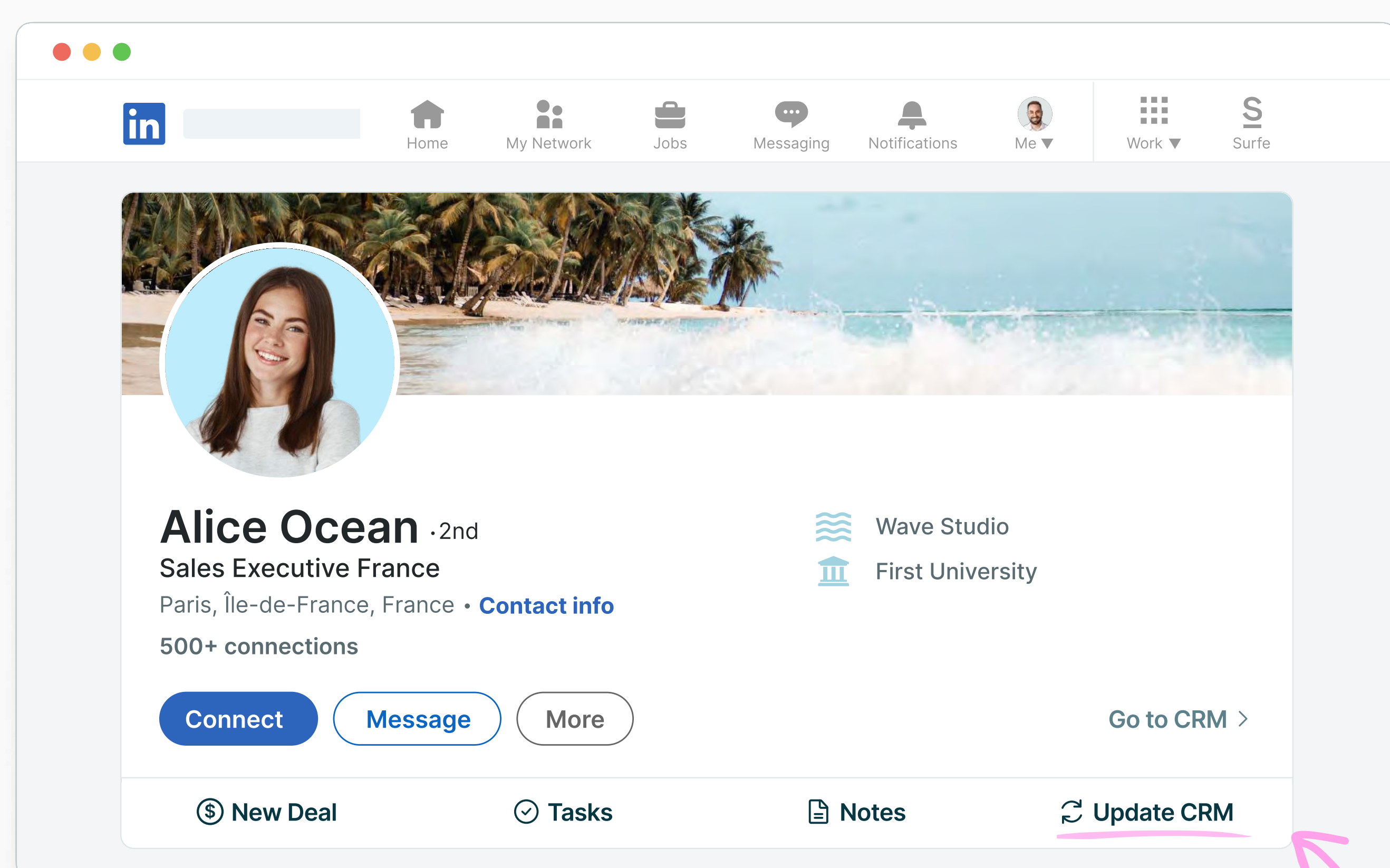
In fact this is a problem faced by many companies where **every year, 30% of their contacts in the CRM becomes outdated**. The entire process, especially when it happens with frequency - **eliminates resell opportunity and is an unnecessary loss of time**.



“Surfe makes Copper more alive as our consultants are able to stay up to date with their prospects inside the CRM, by using the “update copper” button on LinkedIn”



Ariell Heacox
Project Coordinator
at RHR International



Here!

Solution

Avoid having any contact loss with Surfe's 1-click update.

The RHR team has found **Surfe's interface** to be **very user-friendly**. In fact, Ariell mentioned during our discussion that consultants have found it so easy to add contacts to the CRM that they no longer wait until they have downtime to do so.

The **1-click update feature has proven to be particularly useful** to RHR's team of consultants, since it allows them to **more easily track their clients when they move companies**.

For example, if a consultant learns through an external source (like a story in the press or by word of mouth) that a given executive has moved companies, instead of trying to manually log in their new company's name, their new job title and a new email address, the consultant can simply find the client's LinkedIn profile and click the **"Update CRM" button**.

Then, **Surfe will take it from there**, by finding their new email address, **updating** the new company name and job title, eliminating a time-consuming step for each consultant.

There are other situations in which this 1-click update feature would save a lot of time, too, like if a consultant learned of an executive leaving their former employer after receiving a bounceback email. The same 1-click process would apply, and **saves** the consultant **from having to scramble to track down all the new vitally important email**.

Or, the most common occurrence is when a consultant could simply see a post on LinkedIn stating that they have started working for another company.

94%

satisfaction rate
in the past 18 months

93%

retention rate
in the past 18 months

Instead of having to research his new email address online or ask him directly via messages, the consultant would simply select the "Update CRM" feature on the client's LinkedIn profile and **Surfe would do the updates for them, saving them crucial time** and from awkward fact-finding conversations.

RHR's consultants have also loved the fact that they **can access the client's CRM profile directly in 1-click on their LinkedIn page**, not only after updating the profile but also after adding them to the CRM or after synchronising a conversation.

Ariell also mentioned that when they first installed Surfe, the interphase was so easy to use and well integrated inside LinkedIn that it got several consultants excited just to use Surfe entirely that day to add and update profile into the CRM.

Thanks to smart features from Surfe, RHR consultants are able to **take full advantage of their high retention rate** and more easily keep their client profiles updated, resulting in no clients getting left behind. This frees consultants to continue to do what they do best: setting up their clients to be leaders in the world.

With a **94% satisfaction rate and 93% retention rate in the past 18 months**, RHR International has clearly done a substantial job of building up trust with its clients.

Since implementing **Surfe's 1-click update feature**, RHR consultants have **updated at least 100 accounts & have completed over 3000 actions** with Surfe, leading to even better client retention and ultimately saving many hours at work for new customer acquisition. On top of it all, RHR consultants have felt **intangible benefits from Surfe features**, such as the peace of mind that comes with knowing all of their vital prospect information can be transferred & updated accurately in just one click, guaranteeing their valuable clients won't slip through the cracks.

“Surfe closes the gap between LinkedIn & the CRM (Copper). It's powerful, but yet simple, features helped us to have 0 contact loss, allowing our consultant to nurture their relationship with their clients better.”



Ariell Heacox
Project Coordinator
at RHR International



Develop outstanding, performance-oriented leaders with RHR International's extensive expertise on executive board evaluation, and CEO transition, succession and coaching.

[Talk to an RHR International consultant today!](#)

