

Case Study

How Worklife closed deals with large clients (all online) by optimising social selling for its global team

Cold calling is almost dead. How can you optimise ‘social selling’, to get the best ROI, from your international team ?

Worklife’s primary goal is to reinvent company benefits. It’s based on both an app and a physical card that allows companies to manage, finance and promote their employee benefits - all in one place. Worklife’s services are used by over 1 million employees, allowing each of them to unlock the full potential of the benefits they’re entitled to and improve the quality of their lives, at work and at home.

The global health crisis that is COVID-19 has shown that many employer-provided benefits no longer suit the needs of today’s remote worker. Employee expectations have changed - and continue to change - rapidly among the crisis. Worklife’s platform allows companies to stay agile, showing they’re committed to providing for their employees and simultaneously empowers the HR department to achieve its goals relating to recruitment, retention and engagement.

We sat down with **Sergio Bellon, COO of Worklife**, to discuss the experience his company has had managing leads for potential clients. He has continually provided great feedback to the Surfe team, and noted his belief that there’s a missing link in the relationship between Pipedrive and LinkedIn, and found that after testing all available tools, Surfe best suited the needs Worklife has to make its business successful.

Company Overview

- B2B customers
- 60+ companies
- Presence in 19 countries across Europe and Asia, including France, Spain, Portugal and Germany
- Headquarters in Paris, Île-de-France
- Provides services to over 100 companies including Randstad, AstraZeneca, Société Générale, Renault Group and more

Challenge 1

Cold calling your prospects no longer works and is too time-consuming with low conversion rates.

Worklife is equipped with a team of powerful Sales Reps but in recent times, Worklife has come to realize that cold calling prospects don't yield the best results anymore. There’s a simple explanation for this: Buyer behavior has changed. **Information is more readily available than ever before, so prospective buyers don’t make purchase decisions without first doing their own due diligence.**

Many workers/prospects just don’t want to be called during their work day, and find it **annoying to encounter a pushy salesperson** on the other end of the line. According to Momentumdata, just 2% of people feel it’s OK to receive a sales call. What’s more, just **0.3% of sales calls lead to conversions.**


Social selling is the future. Surfe makes that easier than ever.

As sales teams move away from cold calling, it's clear **social selling is the future**. Instead of making calls that require immediate feedback from a prospect, social selling allows a salesperson to nurture an existing relationship over a longer period of time, taking the “pushiness” out of a sales pitch. With the changing buyer attitude and exemplified by the pandemic, **Worklife had to immediately adapt its marketing outflow**, shifting to social selling as the primary way of prospecting for potential clients.

Salesrep can add prospects to the CRM after they showed interest, making the CRM more clean & streamlined.




1



Alice Ocean · 2nd

Active now




Alice Ocean 4:32 PM

Hello Agatha!

Thank you for your Sales Pitch. I think Worklife could be a useful for our company. I will discuss it with our HR team and perhaps we can have a call next week.




Contact not in CRM - Add now


2



Alice Ocean · 2nd

Active now





Alice Ocean 4:32 PM

Hello Agatha!

Thank you for your Sales Pitch. I think Worklife could be a useful for our company. I will discuss it with our HR team and perhaps we can have a call next week.

Contact not in CRM - Add now


+ Add as Contact

+ Add as Lead

+ Add to Deal




Write a message...


3



Alice Ocean · 2nd

Active now






Alice Ocean 4:32 PM

Hello Agatha!

Thank you for your Sales Pitch. I think Worklife could be a useful for our company. I will discuss it with our HR team and perhaps we can have a call next week.

Sync with CRM



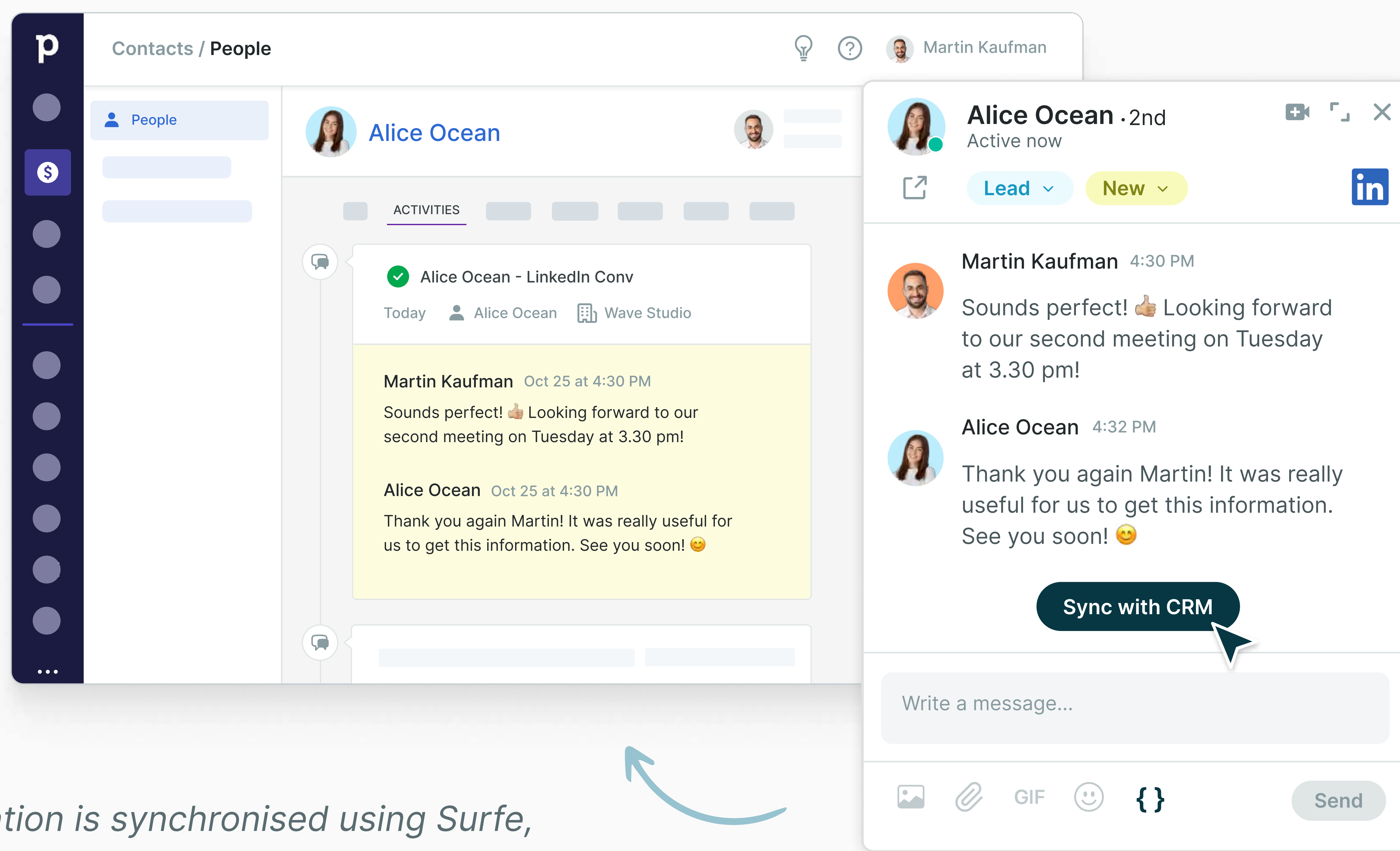
Write a message...

4

A screenshot of a WhatsApp chat interface. At the top, the contact's name is "Alice Ocean" with a subtitle ". 2nd". To the right of the name are icons for voice call, video call, and a close button. Below the name, it says "Active now". The chat history shows a message from "Alice Ocean" at "4:32 PM" that says "Hello Agatha!" followed by a paragraph: "Thank you for your Sales Pitch. I think Worklife could be a useful for our company. I will discuss it with our HR team and perhaps we can have a call next week." Below the chat history, there is a status "Synchronized" with a green checkmark. At the bottom, there is a text input field with the placeholder "Write a message...".

The nature of cold calling dictated that Sales Representatives add every possible prospect to the CRM, leading it to be crowded, disorganized and overwhelming. The social selling model enabled by Surfe allows the sales team to be **more targeted in their approach** to evaluating prospects, as only the ones who react positively to Worklife's outgoing

marketing are added to the CRM as qualified leads. Once a positive message is received from a prospect, the Worklife Sales Rep **can add qualified leads into the CRM - along with the entire conversation history - directly from the LinkedIn messaging board in just a second.**



When conversation is synchronised using Surfe, it will be shown immediately in the CRM.

Challenge 2

Worklife is receiving high demand internationally but managing a sprawling international sales team can be exigent.

In just under a year, Worklife impressively managed to **tap into the international market**, spreading across many countries and timezones. Worklife sales team is also growing and physically located all over Europe. This makes it even more critical to **keep detailed records of their prospects' interaction** in the CRM, to ensure the success of the company's sales goals.

Like most Surfe users, Worklife's Sales Representatives use their personal LinkedIn profiles to prospect & approach potential clients. It would very easily become time-consuming and tedious to transfer every single prospect

interaction into Pipedrive for the entire team and sales leader to access the progress of a prospect.

Unlike cold calling where you can get an answer immediately, **social selling takes more time to nurture** its potential client. If the CRM is not updated or if a Sales Rep did not check the CRM, a prospect can accidentally be contacted by several Sales Reps of the same company, from different countries, which may look disorganised and unprofessional.

Another frustration faced by many sales leaders is the **sense of distrust, as the data recorded in the CRM is often not accurate**. This could be because their Sales Reps tend to forget to copy & paste conversation or log the data in the wrong prospect page. The solution (before Surfe) was for the Sales Leader to constantly ask the Sales Reps if the information for a particular prospect is updated, which can give the impression that the **Sales Lead is micromanaging the team**.

Solution 2

Surfe makes CRM reporting easier especially for remote teams

With a team as spread out as Worklife's, it's critical to have all data and **contact between a Sales Representative and a prospective client recorded in the CRM.**

Surfe is **ideally suited to teams working remotely**, thanks to the capability to add prospects and sync the conversation history in one click. This keeps things up-to-date and organized for any member of the team who may be working with a given prospect.

It allows senior leadership, like Sergio in this example, to **monitor sales progress across all the countries** Worklife operates in. It also eliminates the risk of losing contacts and human errors that could come about from manually inputting data. Finally, in terms of team management, Surfe allows him to **trust the CRM more** as he knows that the data is accurate and thus giving him a better overview on Worklife's global sales strategy.

“Surfe is so well integrated that it seems part of the LinkedIn website. It was very easy to install and adopt, especially because we have a dedicated team at Surfe.”



Sergio Bellon
COO
at Worklife

Besides indicating directly on the prospect's LinkedIn profile page that he/she is **already in the CRM**, Surfe also **highlights them in blue on the search page and side panel**. Surfe also directly displays the contact owner, deal progress and other important information on the LinkedIn profile page. This allows the Worklife sales team to see who has been in contact with a prospect and it's progress, all directly on LinkedIn across the countries in which Worklife operates.

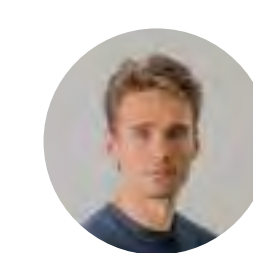
By having this perk, it increases the likelihood that a Worklife Sales Representative could close a deal with the same MNC company, but in a different market.

Mr. Bellon believes the learnings from Worklife's experience are **applicable to just about any company** with a remote team. And even as the pandemic comes to an end, remote work will be here to stay, necessitating accurate and up-to-date reporting in the CRM.

The demands of the new work environment make **Surfe's product allowing for deeper collaboration and more autonomy** among the Sales Representatives all the more essential.

Before Surfe

People you may know



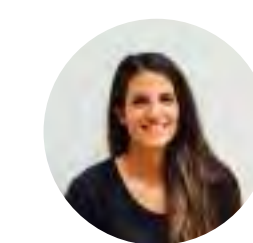
Arnaud Caillou
Building strategic and compelling brands

Connect



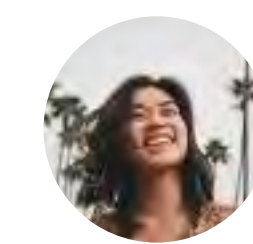
Julien Lauzon
Partner at Tom Tom

Connect



Nina Stizi
Product Manager at Bunny Studio

Connect



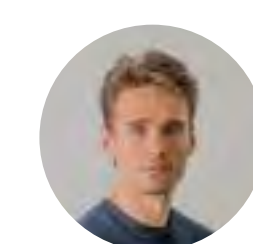
Kate Moss
Model at London ELIT Agency

Connect

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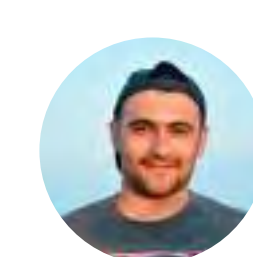
After Surfe

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Head of Sales

Message



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// Social selling

improved drastically

Amid a global pandemic and a massive shift in the expectation of how sales teams operate, Worklife was able to ink deals with several global companies including Randstad, AstraZeneca and Ubisoft - all online, with the help of Surfe!

Since Worklife joined Surfe, the sales team have synchronised **more than 1,500 LinkedIn conversations back to the CRM, making them save more than 300 hours of work.**

And of course, there are more intangible ways working with **Surfe improves the workflow of salespeople**, namely: empowering them in their day to day social selling process on LinkedIn and having real-time, accurate syncing of prospects information in the CRM across all markets in which Worklife functions.



Worklife's goal is to maximise the welfare of companies and their employees. Manage employee benefits in one place and keep workers happier and more engaged at the same time.

Contact Sergio Bellon at sergio@worklife.io to start increasing your company's welfare and reducing HR tedious tasks.

Optimise social selling and more effectively manage your remote or international teams today with Surfe.

Register for your free trial now at Surfe.com

