

Surfe | batch

How Surfe helps Batch with their ABM approach & reduces prospecting time by $\frac{1}{3}$ on SalesLoft - Salesforce

Batch x Surfe Case study interview with Axel

Surfe

Company overview

- Based in Paris and Lyon, France
- Launched in 2014
- Mobile-first Customer Engagement Platform focused on fostering communication
- 50+ employees
- Clients include Société Générale, BNP Paribas, FNAC Darty, L'Oréal, Oui SNCF, McDonald's, Galeries Lafayette and more

Batch is a marketing platform that helps brands establish better connections and communication pathways with their clients. **They specialise in push-notification channels and also provide brands with in-app messaging** and Webpush in order to help them reach their business goals and KPIs.

Thanks to Batch's seamless user experience, easy-to-create campaigns and lightweight SDK, they've recently

reached 1 billion installations and 10 billion tracked events per month across a client base that includes banks, Fintech firms, retail on-demand services and startups!

Batch has recently decided to revamp their sales process to move closer to an account-based marketing approach (ABM). In the process, they decided to begin using SalesLoft and found they needed a solution to act as a bridge between LinkedIn/SalesLoft and Salesforce.

Batch turned to Surfe at the end of last year to make the ABM process smoother for their sales development representatives (SDRs) and to bridge the gap between LinkedIn/SalesLoft and Salesforce.

We sat down with Axel Debreilly, Business Operations Manager at Batch, to talk about how Surfe helped them realize their strategic business transformation.



“Previously it took at least 15 minutes to put a prospect from LinkedIn to SalesLoft while also recording it on Salesforce. Now with Surfe, it takes ⅓ of the time and I don’t have to leave LinkedIn.”

— Axel, Business Operations Manager at Batch **batch**

Challenge 1

Automation is seemingly effective but it has low conversion rate

At Batch, both SDRs and business development representatives (BDRs) have the goal of creating opportunities for their teams.

And being the innovative and ever-evolving company that it is, Batch naturally wants to optimise the efficiency of their sales processes and set up automation tools for their team of SDRs — after all, 100% automation is the dream, right?

For a while, it was. But as time went by, the Batch team noticed their conversion rate was not as high as before. This mirrors a phenomenon throughout the industry, as potential clients are picking up on automated messages and deleting or ignoring them.

Solution 1

ABM implementation with Surfe

After exploring a variety of solutions, Axel found that moving toward Account Based Marketing (ABM) to ensure a more personalised approach to clients was the best solution, as it's proven itself to be effective in the SaaS universe.

At the end of 2020, Batch completely revamped their sales and prospecting process, **moving from complete automation to a more personalised multi-channel approach.**

Social selling has become the new gold standard for online sales — many companies have already reaped the benefits of this approach. As a company who believes firmly in communication, Batch was ready to move away from total automation and into the world of sales by establishing real-life connections.

However, it wasn't completely seamless. As Batch moved to social selling, Axel observed that his SDRs were also spending much more time on manual data entry, since each account is unique and requires attention.

He looked to Surfe as the solution for **pushing contacts from LinkedIn to Salesforce automatically** and other important details.

ABM is all about a very targeted approach by keeping the prospect pool smaller but with higher conversion. Thus a lot of conversations are exchanged between BDR & the potential client on LinkedIn in order to nurture them slowly. Instead of having to copy-paste all of the conversation, Batch BDR can now simply click on 1 button to sync all conversation to Salesforce, via Surfe.

This was a massive relief for Batch's BDRs as they were able to eliminate some of those mundane tasks in the day-to-day of sales, saving them time and freeing them to focus on what matters most for ABM: relationship building.

Surfe

Challenge 2

SalesLoft is an innovative tool but there is still a gap between LinkedIn and Salesforce

SalesLoft is a great tool that helps sales representatives accelerate the sales process.

At Batch, **reps spend 50-60% of their time on LinkedIn to map accounts, source contacts, enrich those contacts**, put them into cadences and then mine information so they can send personalised messages in SalesLoft.

However, Axel felt like there was still a gap between LinkedIn, SalesLoft and Surfe after observing SDRs having to find prospects on LinkedIn and then copy/paste and enrich their data when inputting in Salesforce. They then had to put these leads into the auto room so that Salesforce could recognize these new leads. Finally, they could place the leads into the SalesLoft cadence.

This is no doubt a tedious process, but a necessary one — so Batch needed to find a solution to reduce the amount of time needed to put someone in the SalesLoft cadence and record that in Salesforce.

Solution 2

Surfe helps to bridge LinkedIn-SalesLoft and Salesforce

This issue Batch was facing is where Surfe came in to play — it is able to serve as the bridge between Batch's Salesforce, SalesLoft and LinkedIn operations.

Instead of having to copy and paste information to Salesforce, enrich that, group them and finally placing them into the SalesLoft cadence, Batch's team of SDRs can simply **click a single button and select the appropriate Salesloft cadence directly from LinkedIn**.

Further, Batch's team has really come to appreciate the fact that the contacts that are pushed through SalesLoft are already enriched. For example, they feature professional emails, preferred language, source, etc.



"I used a lot of tools and for Surfe, I would recommend 10/10!"

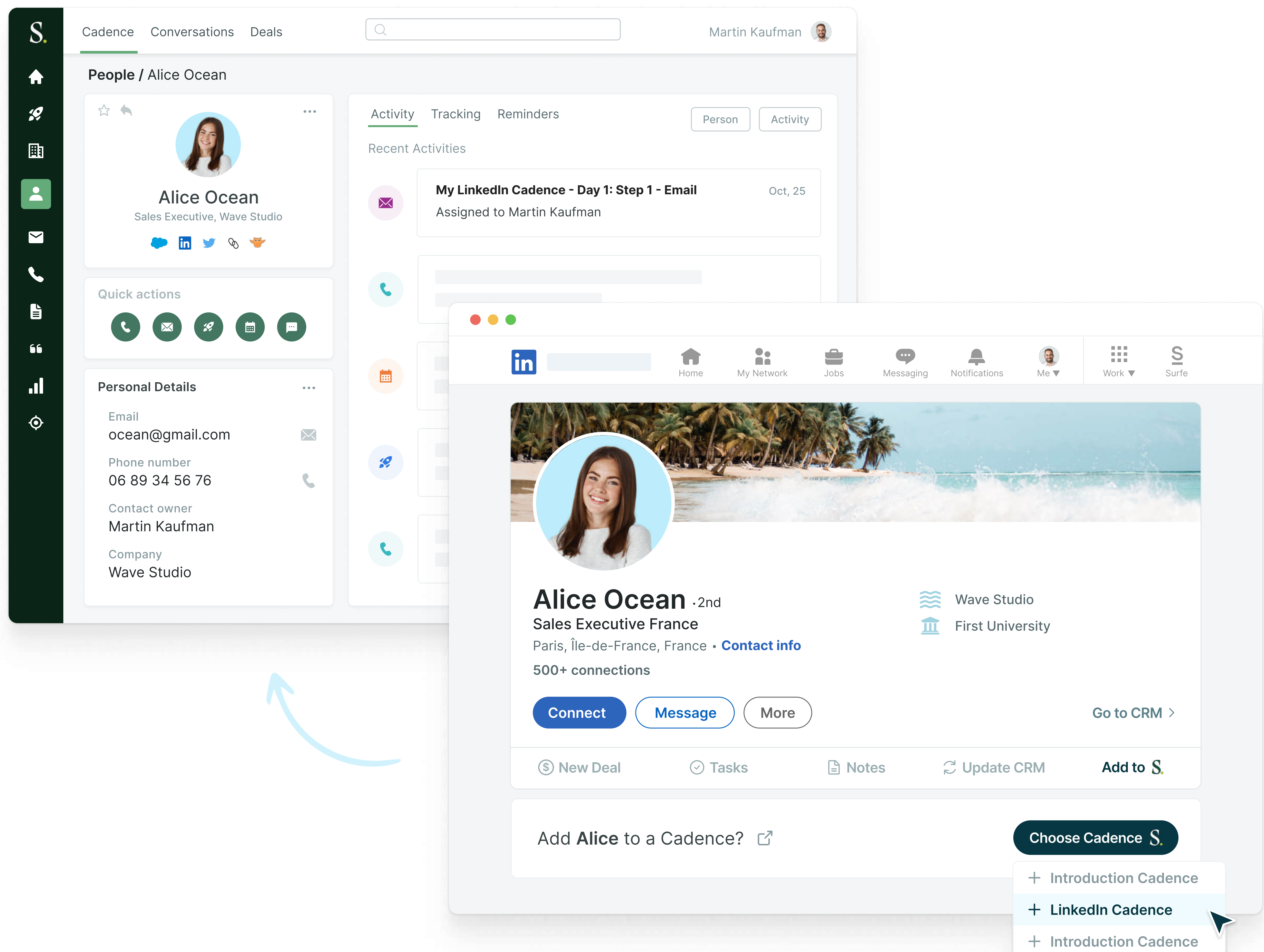
— Axel, Business Operations Manager at Batch

batch

Surfe

Now reps can work directly from LinkedIn. It has cut down the time necessary to put contacts into SalesLoft by $\frac{2}{3}$ — it just takes 5 minutes now.

With the time they've saved, **Batch's BDRs are able to add more prospects into the cadence pipeline**, giving them a greater chance of closing deals.



ROI of using Surfe to implement ABM successfully

Since implementing Surfe throughout the team, Batch has felt it's easier to conduct ABM by personalising the sales approach and maintaining data in real time on Salesforce.

Having Surfe as a link in the multi-step sales process as a bridge between Salesforce, SalesLoft and LinkedIn has led to a reduction in the time necessary for sourcing and prospecting by $\frac{2}{3}$, **from 15 minutes to just 5 minutes per contact!**

Surfe

Since implementing Surfe, BDRs have been able to save 2 to 3 hours weekly for following up on deals that are about to close. This has enabled the team to execute more follow-ups, leading to a greater win rate.

The CRM overlay feature has allowed Batch to push clean data to their CRM, helping the rollout of their strategic shift to ABM.

Keep customer engagement high through sophisticated push notifications, in-app messaging and web push. Contact Axel Debreilly at axel@batch.com for more information.

Do you want to embrace ABM & reduce your downtime on SalesLoft by $\frac{2}{3}$?
Start your free trial with Surfe today!