

Surfe



BusinessFirst

Watch how BusinessFirst optimizes their Sales Networking Strategy to deliver personalized service with Surfe

Case Study - BusinessFirst

Surfe

Company overview

- Founded in 2017.
- Based in Paris, France.
- 100% growth rate.
- 90+ employees.
- 100 clients including companies like AB Tasty, Contentsquare, HiPay, Alma, Klarna, and Mirakl.

BusinessFirst is the leading business referral network in the B2B tech industry, with over 500 members among the most successful Head of Sales and Account Executives from the European ecosystem.

BusinessFirst's mission is to enable sales teams to access highly qualified leads and sell more intelligently through a powerful network system named "The Club."

By bringing together non-competing companies and professionals addressing exactly the same customers and prospects, every interaction between members is business oriented and ROI driven.

We spoke with Mathilde Capello from BusinessFirst, who told us Surfe has been incredibly helpful in smoothing out their sales workflow. Here's more on how Surfe lifts tedious tasks off sales reps' shoulders and ensures efficiency in the team.



"It's really convenient to have a tool that is completely linked, fluent and easy to use with Salesforce."

— Mathilde Capello, Partnerships Manager at BusinessFirst

Challenge 1

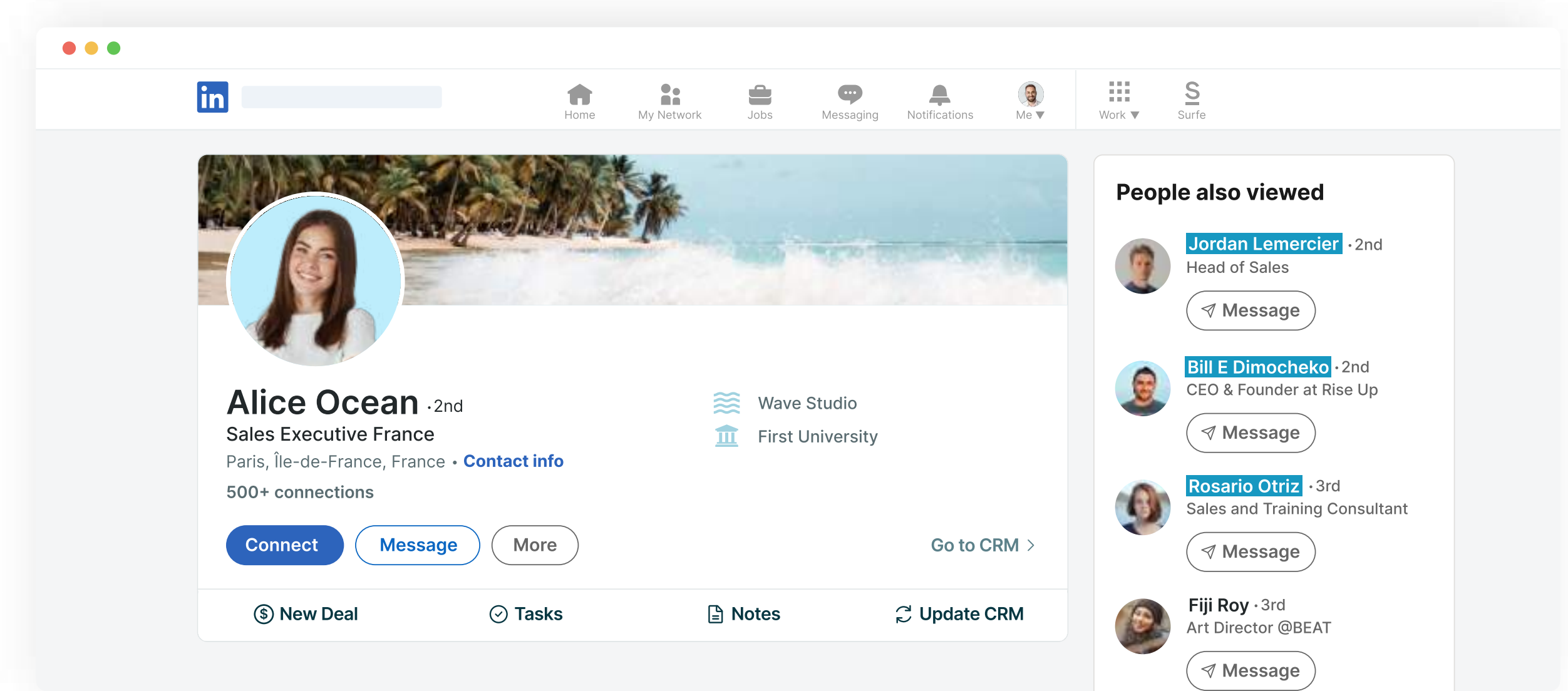
Detecting CRM contacts on LinkedIn causes confusion in sales team

To be able to provide the best community to their members, BusinessFirst searches for interesting prospects that fit their network every day. Sales representatives strive to source and connect with professionals who would benefit from their network, but also the ones that would bring value to other members. But winning every deal is unrealistic, so BusinessFirst adapted a retargeting strategy within their sales team.

However, when you have several sales people in the team, it often happens that several sales-reps contact the same prospect, not knowing that the person had already been approached. Situations like this usually lead to confusion and awkwardness from both sides, and might result in the prospect churning.

the team has already contacted them. Therefore, any **confusion within the team is eliminated** meaning no overlap of sales activities with the same client.

When new sales representatives take the lead in their colleague's unsuccessful deals, they can see contacts directly on LinkedIn and have all the information on previous interactions easily accessible. Surfe allows BusinessFirst's salespeople to **seamlessly integrate LinkedIn and Salesforce**, saving them time on switching tabs and searching for required information in their CRM.



Solution 1

Surfe displays your CRM contacts on LinkedIn & highlights them in blue

By utilizing Surfe, BusinessFirst's sales representatives can easily detect whether a prospect from LinkedIn already exists as a contact in Salesforce. Surfe **highlights all CRM contacts in blue** directly on LinkedIn, eliminating the need to switch back to Salesforce for verification. This way, salespeople know that business activation has already been done with a prospect as someone from

Surfe

Challenge 2

BusinessFirst strives to make every client feel special by remembering everything they say, but with a growing number of accounts, important information can sometimes be forgotten

Although nowadays salespeople are supported by various software and operational tools, staying organized, efficient and constantly in the loop can still be tough. BusinessFirst's professionals know that they can never let important details slip through the cracks. However, we shouldn't forget - sales representatives are human too.

"When you are a salesperson, every word counts," says Mathilde, a sales representative at BusinessFirst.

Having to remember every single detail about a contact can be challenging, but it is crucial to recall everything that was said and most importantly - how it was said.

Since BusinessFirst mainly prospects on LinkedIn - where their ideal customers prefer to communicate and are most responsive - sales reps have to constantly refer to Salesforce records to refresh their memory about a conversation or the state of the deal. Needless to say, this process takes away precious time and also allows space for error or misinformation which can negatively affect the relationship and conversion.

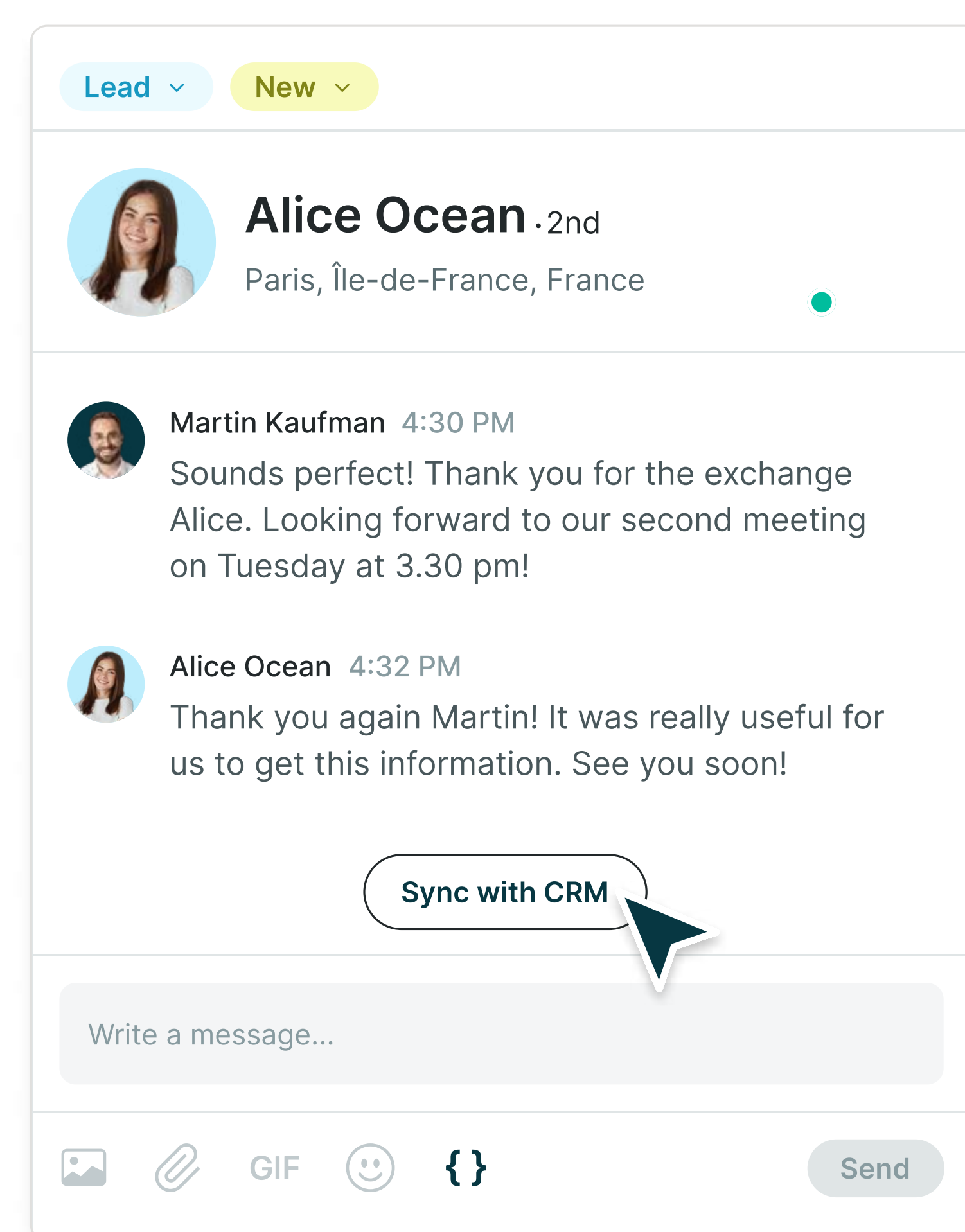
Solution 2

Surfe synchronizes Salesforce data with LinkedIn

As Surfe completely **integrates Salesforce with LinkedIn, all of the information becomes inter-synchronized**, making the salesflow smoother.

Whatever data is recorded in Salesforce is now also accessible directly from LinkedIn. BusinessFirst sales reps can easily access all of the necessary information from a contact's LinkedIn profile.

Surfe's **message auto-synchronization feature** transfers all conversations to the CRM, making sure **no information is lost** or forgotten. When a prospect replies, his message is recorded in Salesforce straight away. This means that if a salesperson is working in Salesforce, they don't have to switch back to LinkedIn's direct messages to search for the right conversation.



Surfe

As Surfe is smoothly **embedded in the LinkedIn interface**, salespeople don't feel like they are using an additional external tool in their workflow - which means they can focus on what really matters.

BusinessFirst now also leverages Surfe's new **deal feature** which allows salespeople to see if a prospect is linked to an opportunity they had previously created in Salesforce. Surfe shows the deal a contact is associated with, the stage the deal is at, and even allows managing the deal from their LinkedIn profile. Sales representatives appreciate how they no longer need to switch back and forth between Salesforce and LinkedIn, saving themselves the hassle of extra clicks.

Surfe has become an extremely valuable addition to BusinessFirst's sales team. Now, **no data is lost and no important details are missed**, as Surfe ensures everything is synchronized and backed up in the CRM. With LinkedIn and Salesforce connected, sales reps can easily see their contacts, deals and notes directly in the LinkedIn interface. Having all information available both on LinkedIn and in Salesforce **eliminates confusion in the team** and allows for a **better relationship with the prospects**.

Since BusinessFirst's sales reps no longer need to stress about forgetting important details about their prospects or previous interactions, they are able to **focus on making strong connections and closing deals**.

The sales team no longer has to waste time hopping from LinkedIn to Salesforce and back. Thanks to Surfe, BusinessFirst's sales representatives now **save 15h+ per sales rep monthly!** As the team can view all customer information in one place, they have seen a drastic increase in efficiency.

Looking for the ultimate sales network to power your business?
Contact BusinessFirst at contact@businessfirst.io

Want to have all your CRM data synchronized with LinkedIn? Talk to one of our experts to discover Surfe at hello@surfe.com