Use Surfe to Integrate CRM data into LinkedIn, allowing sales reps to sell better

Case Study - Qualifio

Surfe

Company overview

- Headquartered in Louvain-la-Neuve, Belgium
- Office locations in Paris, France; Amsterdam, Netherlands; and Madrid, Spain
- Interactive SaaS marketing platform that allows first-party data collection
- Clients include L'Oreal, MediaMarkt and Daily Mail

The world is more digital than ever before. As such, companies across the globe are moving to **product-led growth strategies** in which consumer data is of vital importance.

Qualifio has built a platform that allows teams to create 50 different interactive marketing platforms including quizzes, polls, contests, surveys and more.

The goal is to **empower marketing managers** to easily create interactive, fully branded campaigns — no code or special design skills required.

These campaigns can then be published across all your digital channels like websites, landing pages, social networks, mobile apps, etc., and then teams can measure results of the campaign — like number of participants and total leads collected — from those channels.

The Qualifio team has been in contact with Surfe since they became a client in November 2020. Many conversations have centered around Qualifio's desire to bring basic CRM information to LinkedIn.

We recently sat down with Antoine Le Sage, head of sales at Qualifio, to discuss how Surfe has aided in the team's sales processes.

'I have a rule for the sales team, "Everything that is not in HubSpot does not exist." Having Surfe to ensure all activities done on Linkedin are recorded in the CRM really helps our sales reps not only synchronise everything done on Linkedin but also to add more prospects to the CRM.'

— Antoine Le Sage, Head of Sales at Qualifio qualifio

Surfe

Challenge 1

Qualifio now operates in 6 countries; manually logging language spoken for every prospect in LinkedIn can be cumbersome

Qualifio is growing, and now operates in **six countries around Europe**.

The sales team has realized improvements in their sales process since beginning to utilize Surfe late last year (2020). Now, salespeople no longer have to switch tabs each time they want to add a prospect discovered on LinkedIn to their CRM (Hubspot, in this case) — they simply can click one button and information is transferred automatically.

However, there was still one other problem. Unlike the US where practically everyone speaks English, the European market features several different languages, and **businesses must adapt to the local language in the country in which they're operating.**

So, in order to execute proper email campaigns/cadence, prospect information is only considered complete when the language field in the CRM displays the accurate spoken language. However, Qualifio's sales teams had to manually input the spoken language for each prospect, leading to wasted time and a more cumbersome step in the sales process.

Solution 1

Surfe provides an overlay of your CRM directly on LinkedIn, allowing you to edit fields directly from LinkedIn's interface

Representatives from Qualifio requested that Surfe find a way for their sales representatives to add language and region information directly onto a prospect's profile in the CRM.

Thanks to many constructive conversations with Qualifio, we at Surfe were able to create the **new CRM overlay feature.**

We understand that each of our client's products — as well as their sales processes — are unique, and so we created this tool with the ability for companies to add and customise fields as they see fit.

Companies can add as many fields as they want, or pre-select the most important fields so that it's easy for sales representatives to find basic prospect information on LinkedIn, rather than having to go back and forth between LinkedIn and the CRM.

For Qualifio, "language spoken" is one of the most important pieces of information, so they chose to move that field to the very top.

When a prospect is added into the CRM using Surfe, if the prospect has included the language spoken on Linkedin, it would be **automatically added in the field,** otherwise Qualifio sales-rep could also add them manually.

After language information is added, Hubspot (Qualifio's CRM) recognizes this and would direct sales reps to push out marketing campaigns according to the first language spoken by the given customer.

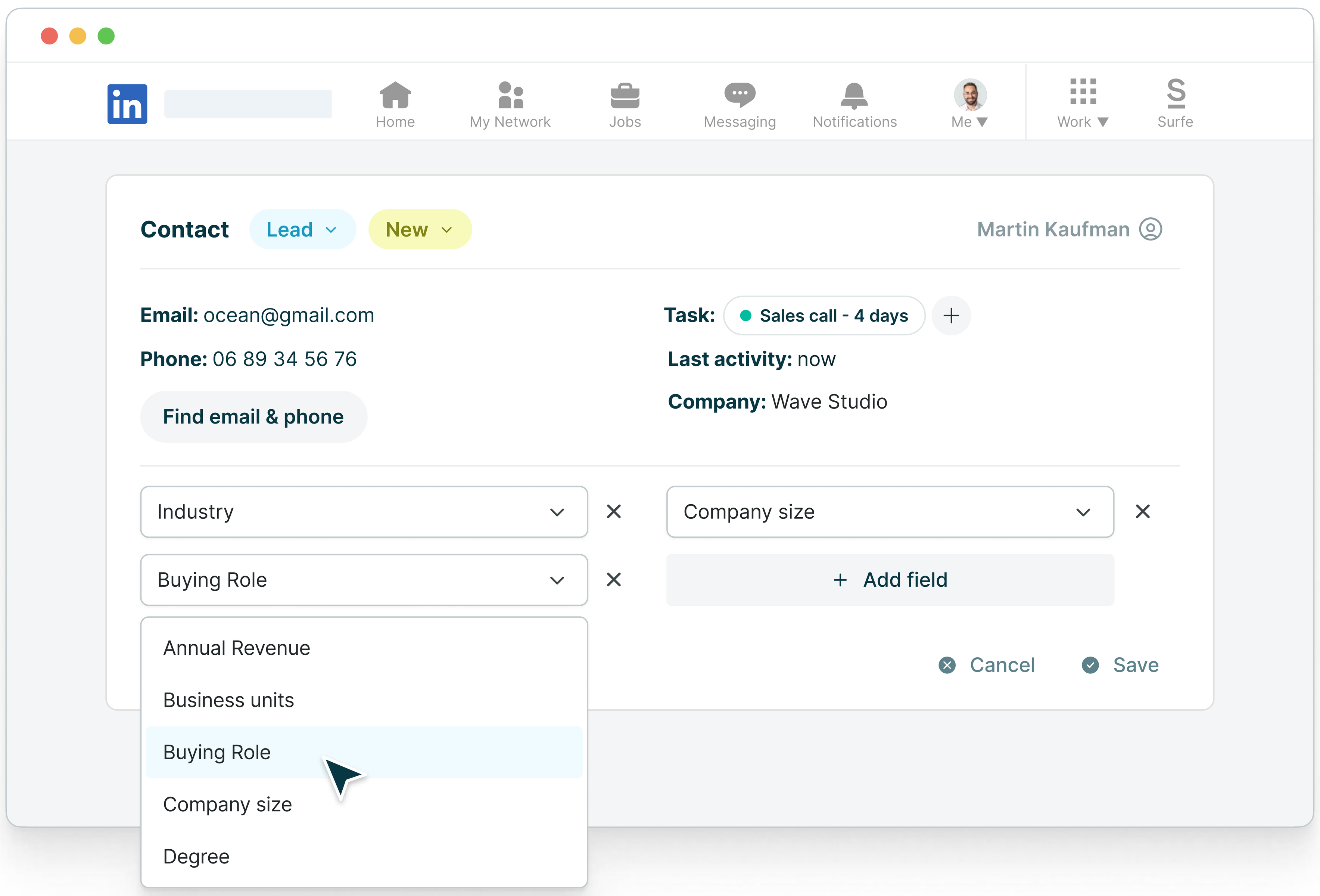
This feature alone has allowed Qualifio to **segment its database of prospects and to more effectively deploy email campaigns.**

This information is now visible when the sales rep returns to that prospect's profile and is able to be viewed by others on the team.

And, if the information of the custom field is available publicly on the prospect's Linkedin profile like seniority, education, skills, etc. it can be **auto-filled.**

Finally, any information added to these fields is **automatically synchronised to the CRM,** eliminating the need for extra clicks or data transfer.

It works both ways, too, so when these fields are edited within the CRM, those changes reflect in LinkedIn.



Challenge 2

All leads and all conversations on LinkedIn must be recorded in the CRM, but it takes too much time

Like many other clients, Qualifio values the ability to synchronise prospect information and conversations instantly with Surfe.

Antoine has one guiding principle when it comes to prospecting: **"If it's not in the CRM, it does not exist."**

This is something all sales teams should take to heart. It can sometimes be difficult for a sales team leader or head of sales to keep track of all the activity of your sales reps, especially LinkedIn conversations which (in the past) couldn't be synchronised automatically like emails.

Sales reps would have to copy and paste their entire conversations or even summarise them when they were especially long.

Two problems arise from situations like this: It **takes too much time and breaks the momentum** in the sales process; and it's common that sales reps do manual data entry at the end of their days, which could lead them to forgetting to input certain pieces of data or putting it in the wrong profile in the CRM.

Solution 2

Surfe allows reps to add prospect information in just 1 click, saving time and encouraging more prospecting

The solution to this dual-problem is simple: Surfe's 1-click prospect information & conversation synchronisation feature.

Qualifio sales reps have seen this feature work in real life. It has become a habit among them to click the "synchronise to CRM" button after receiving a reply from a lead or finishing a conversation with a prospect.

This **instantly saves the information from those activities in the CRM,** eliminating the need to manually input information and allowing heads of sales like Antoine to **easily monitor the progress** of his team of sales reps.

Even better, Surfe's 1-click synchronisation feature **works with Sales Navigator,** which Qualifio's sales reps use.

New feature alert:

With **Auto-Sync of Messages**, now, you can just click the "Synchronise to CRM" button once and all subsequent conversations will sync automatically, allowing you to easily log conversations had through your mobile phone or when a prospect replies to you.

ROI from using Surfe

Since they began using Surfe about a half a year ago, the team has **logged a collective 105 hours saved** thanks to not having to do the tedious task of manually entering data and copy/pasting information.

And, the CRM overlay feature has reduced the number of back-and-forth clicks between Hubspot and Sales Navigator/ LinkedIn by about **5,000 clicks.**

This has also allowed Qualifio to **more effectively segment their sales database, leading to more effective prospecting** with the appropriate marketing campaigns.

In fact, adding prospects to Hubspot has become so easy that Antoine has noticed since installing Surfe, his teams have gotten more qualified leads in Hubspot, leading to an increase in sales.

Do you want to bring your CRM right into LinkedIn in order to prospect more effectively? Sign up for your free 14-day trial today!