

Surfe



shipup

Shipup boosts sales team efficiency as Surfe connects HubSpot with Sales Navigator

Case Study - Shipup

Surfe

Company overview

- Founded in 2016.
- Headquartered in Paris, France.
- It's a SaaS platform revolutionizing post-purchase experience in e-commerce.
- Clients include E.Leclerc, Yves Rocher, Carrefour, NA-KD, bareMinerals, Petit Bateau.

Shipup is a SaaS platform that helps e-commerce businesses provide a post-purchase experience that encourages customer retention and loyalty. Shipup tracks package deliveries in real time, creating a seamless branded experience

compelling enough that customers are enticed to come back in the future. With the enhanced customer journey, error is minimized and clients are more satisfied with online shopping.

Established in 2016, Shipup works with over 400 brands in Europe and North America - ranging from pure players to more traditional brick-and-mortar clients, on their digitalization journey - helping them build customer confidence and brand loyalty.

We spoke to Caroline Gaubert-Amy, BDR manager at Shipup, about how Surfe helped her create the ultimate sales structure in her team and optimize everyone's flow.



“Surfe makes it very easy to collaborate directly in Sales Navigator.”

— Caroline Gaubert-Amy, BDR manager at Shipup

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Challenge 1

Need to create a more efficient sales structure, as the company is fast growing while integrating the existing toolstack that current BDRs are already comfortable with

Shipup was looking to create the ultimate BDR team, and Caroline wanted to put in place a sales structure that would run smoothly and effectively.

One challenge she faced was linked to the present toolstack: the CRM of choice - HubSpot, and the main preferred prospecting tool - LinkedIn Sales Navigator. As great as both platforms are, HubSpot does not have a native integration with Sales Navigator. This is why Caroline was looking for middleware solutions to synchronize the tools.

Shipup's team of 15 was spending a lot of time sourcing interesting prospects on Sales Navigator, only to find out some of them were already in HubSpot. This basic and seemingly unimportant detail was lengthening the salesflow and bringing in confusion, as BDRs were unable to detect a CRM contact without going back-n-forth between the CRM and the prospection tool.

As Shipup has recently started utilizing HubSpot Marketing Sequences for their outreach campaigns, they would prefer to synchronize those with their prospecting activities for optimal performance.

Shipup knew they needed a solution that would alleviate these struggles and allow them to be more efficient. It was important that the intermediary tools

were easy to use and quick to deploy, but also agile. At the time, Shipup did not have a dedicated marketing team to be in charge of the discovery and set up process. They also wanted something self-service - to make sure they could easily make necessary changes themselves.

Solution 1

By connecting LinkedIn Sales Navigator to HubSpot with Surfe, it helps BDRs to identify prospects who are already in the CRM directly on LinkedIn

Surfe allowed for a **seamless integration of HubSpot and LinkedIn Sales Navigator**. Caroline says the implementation process was easy thanks to the straightforward mapping and the tool's simplicity.

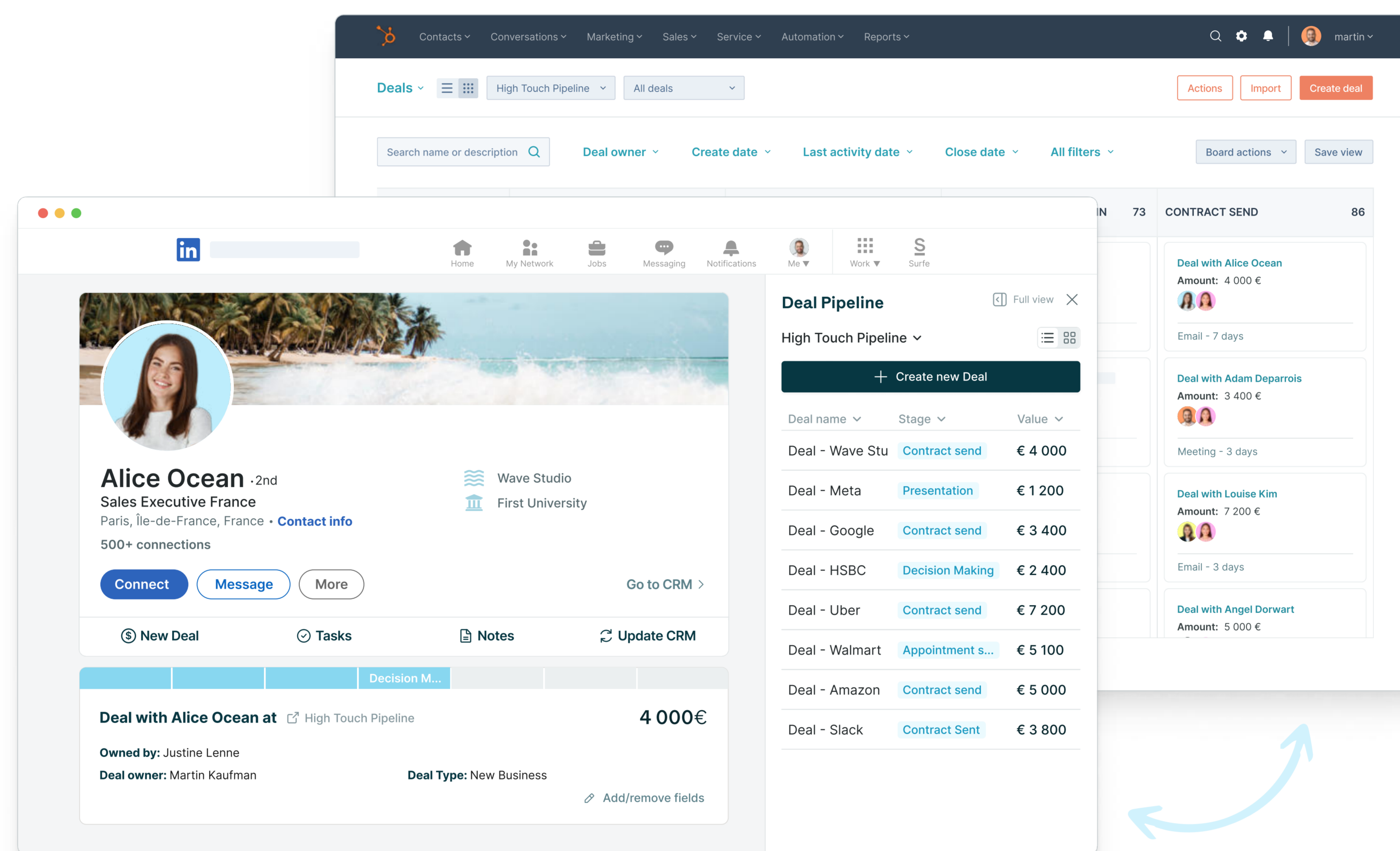
Prospecting on Sales Navigator is so much easier now that all of the CRM data is visible in the LinkedIn interface. Surfe **highlights in blue** all contacts that already exist in HubSpot, meaning that BDRs no longer need to go back to the CRM to check whether a prospect has already been added or approached by one of their colleagues.

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Shipup has taken great advantage of Surfe's **Custom CRM fields feature**, which is embedded in a contact's LinkedIn Sales Navigator profile. The data can be entered directly and synced with the CRM automatically, so that it can be used to make the outreach a lot more effective and relevant to the contacts.

Shipup's team is able to see all the grouped active **HubSpot campaigns in these CRM fields** and choose the relevant marketing sequences to instantly put a contact into one.

BDRs now get personalization for the contact straight from their profile in Sales Navigator - no need to go back-n-forth between several tools.



Challenge 2

As the amount of activities grew, reporting takes the backseat, causing a gap in communication & collaboration amongst BDRs

Prior to using Surfe, not many of the lead flow activities were being tracked at Shipup. The team would usually generate and share data after several activities and contacts were made - during the opportunity deal stage.

This generated uncertainty and confusion within the team and also made managing existing deals harder. As Shipup's BDRs could not monitor lead information while prospecting in real

time, it often occurred so that they spent time on prospects who were already added as contacts or even involved in a deal with their colleagues. Double checking lead data and verifying activities in HubSpot took a lot of time, generating little value from the sales funnel standpoint. These basic actions, required to grasp the idea of the deal state, were slowing down the sales process. Caroline - the BDR manager - wanted to ensure clarity and an optimal

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collaborative environment for her team while providing a solution that would aid each sales representative in their daily workflow and deal management.

Solution 2

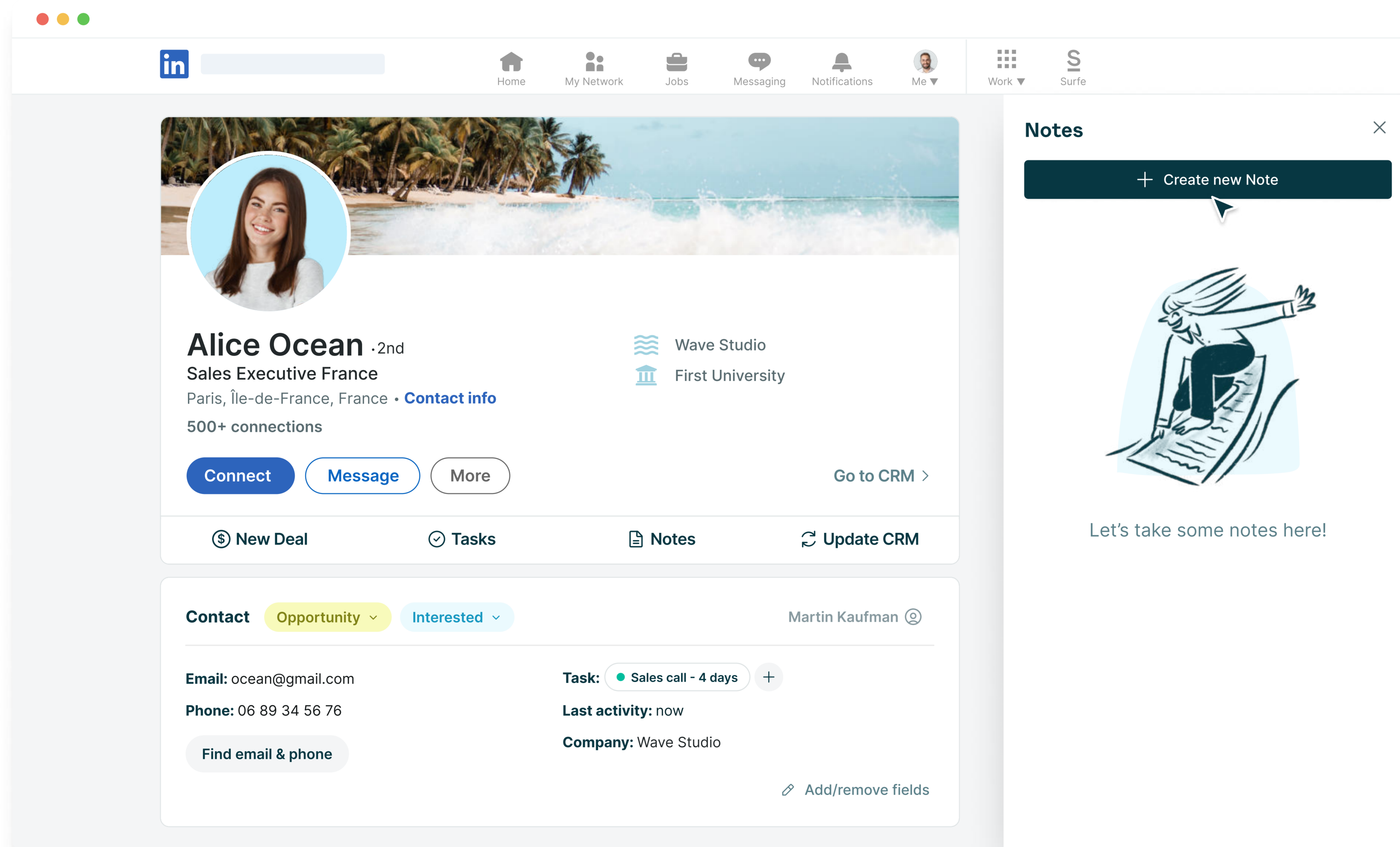
Surfe fosters team collaboration and boosts efficiency on Sales Navigator by easing the transfer of information between LinkedIn-Hubspot

When Surfe came into play, Caroline's team started using it to simplify the lead flow. With all information visible on prospects' Sales Navigator profiles, it is easy to keep track of deal stages and put strategies in place to move leads down the pipeline. It eliminates the confusion and fosters better communication within the team.

Apart from sending prospects directly to email sequences, BDRs love being able to **schedule activities for their leads without leaving Sales Navigator** knowing that every action will be automatically synchronized with HubSpot.

Shipup's BDRs can now easily cooperate while **prospecting directly on Sales Navigator**, as all Account and Lead lists are shared. Surfe makes it easy to see which contacts have already been imported or reached out to and displays the history with each person - all of this without having to switch to HubSpot.

Surfe's newest **Notes feature** allows the team to write down important information and personal details about their contacts or messages for their colleagues, making it easier to collaborate.



Notes feature

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Lead sourcing has also been simplified, as BDRs are able to filter out their saved searches or new search results with Surfe's **blue highlight feature**. There is no need to pay attention to the "new" prospects who are already in the CRM, so the team can focus on the people who have not been considered or approached before.

Since introducing Surfe to their toolstack, Shipup has been able to better structure their sales process by eliminating time-consuming manual tasks and **seamlessly integrating HubSpot with LinkedIn Sales Navigator**.

The bridge between softwares fosters productivity in the team and enables **greater collaboration among BDRs**.

The blue solution has proved itself effective, hence the growth in the number of Surfe users in Shipup's sales team. Surfe is now a daily part of 15 team members' workflow, **saving each BDR over 9.5 hours per month!**

Looking to improve your customer's post purchase experience? Contact Shipup at info@shipup.net to find out how.

Want to optimize your sales structure and connect HubSpot to Sales Navigator? Talk to one of our experts to discover Surfe at hello@surfe.com