

A SILENT REVOLUTION IS BREWING

Know why 2 out of 3 businesses
want to dump their CRM



Featuring data points from "Riding The Next Wave of SaaS CRM", a commissioned study conducted by Forrester Consulting, September 2018

What you will find inside

Chapter-1

The Silent Revolution
(*Breaking free from the herd*) 1

Chapter-2

Why 2 out of 3 businesses like YOURS want to dump their CRM
(*That's millions of \$\$\$\$\$\$ going waste*) 3

Chapter-3

Legacy CRMs: Built for the Emperor, not the Commoner
(*Why the World's #1 CRM may not be the RIGHT one for YOU*) 5

Chapter-4

Challenges being faced by businesses like YOURS with their current CRM
(*Things YOU should know before you select YOUR CRM*) 9

Chapter-5

What do businesses like YOURS actually need in their CRM solution
(*The Wishlist*) 15

Chapter-6

Freshsales may not be the World's #1 CRM, but it may be the 'Right one' for YOU
(*The Wishlist comes true*) 23



CHAPTER-1

The Silent Revolution

(Breaking free from the herd)

Let's face a fact—People don't like change unless they see value in it.

Most often, human nature compels us to follow the well-trodden path. People continue to do things a certain way 'because everyone around us seems to be doing it that way'.

Sometimes though, change is imminent, but silent. It is when people know that the status quo needs to change. That it could be done better. Unaddressed, this dissatisfaction grows into murmurs. Murmurs become discussions. Soon discussions gather steam, and erupt into a revolution. That's often the case with business software.

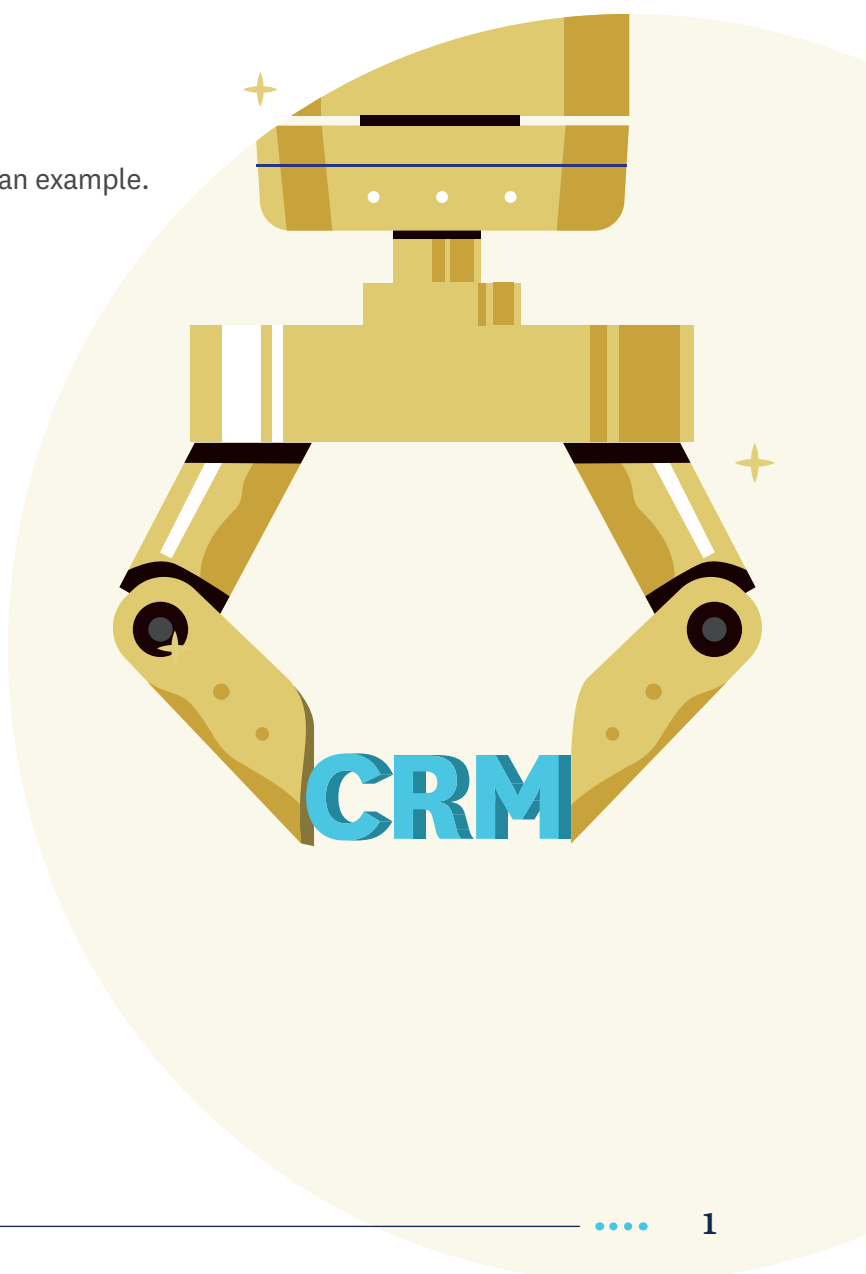
Let's take CRM—the world's most commonly used business software—as an example. One might think all is well in the world of CRM.

Well, it is NOT.

According to a recent Forrester Consulting study commissioned by Freshworks, "Riding The Next Wave of SaaS CRM", a whopping 69% of respondents are planning to replace their current SaaS CRM solution.

69%

of businesses are planning to dump their current CRM in the next 2 years





A silent revolution is today brewing within the industry.

“Are you considering replacing your current SaaS CRM solution? If so, when?”

We are currently looking for replacement and/or piloting solutions

28%

We plan to replace within the next year

15%

We plan to replace within the next two years

13%

We plan to replace in more than two years

4%

We plan to replace, but we have no timetable for a decision

9%

We have no plans to replace our current solution

25%

Don't know

5%

Base: 156 CRM buyers in the UK, US, and Germany

Source: A commissioned study conducted by Forrester Consulting on behalf of Freshworks, September 2018

Note: Percentage may not total 100 because of rounding.

Asking the RIGHT questions sows the seeds for the RIGHT change

We know that such revolutions never erupt in a vacuum. They start when people realize that this is not how life should be: things can be so much better. When people sense that a big change is looming.

But change requires us to ask the RIGHT questions, and actively seek the RIGHT answers. It requires that we consciously move away from the herd-mentality to chart a path that meets our personal goals and objectives. And we believe that, going by what the Forrester numbers indicate, most businesses like yours are NOT asking these questions.

We think it is time for a big change.

Takeaway 1:

Are you asking the right questions for your choice of CRM?

- Am I happy with my current CRM?
- Is it meeting my business objectives?
- Is my sales team happy using it everyday?

Are YOU a part of this silent revolution?



CHAPTER-2

Why 2 out of 3 businesses like YOURS want to dump their CRM

(That's millions of \$\$\$\$\$ going waste)

The Forrester study establishes that a majority of businesses are looking for alternatives to their existing SaaS CRM. For a market that is expected to become an **\$80 BILLION** industry by the end of 2025 (Gartner), the above statistic is nothing short of shocking.

But this silent revolution by leaders such as you is the current reality of the CRM market. As a sales leader today, you would not dispute the need for pursuing constant and continuous

performance improvement—across prospecting and pipeline growth, win rates, sales team effectiveness—to retain an edge in a rapidly changing and competitive marketplace.

But as a decision-maker looking to achieve your business goals and being hard-pressed for time, we understand that it is probably easiest to use a simple rule of thumb and go with the World's #1 solution.

Empower vs Manage—what does your CRM do?

But if you take a step back and think for a moment, would you say that CRM leaders, though they have performed well and maintained their market position over the past few decades, have actually empowered your sales teams to perform? Have they fulfilled the original expectations of sales leaders like you?





When evaluating the performance of CRM leaders over the past few years, it is surprising to see how little business impact these Legacy CRM tool have had on businesses such as yours. According to CSO Insights¹, business metrics that matter most to a VP of Sales, for example win rates, quota attainment, and the performance of your sales team, have shown insignificant improvement.

At the same time, sales morale is falling, impacting retention as sales teams spend a majority of their selling time entering data and juggling tools, taking a hit on their productivity and the blame for low efficiencies. Further, the significant investment of time and money such CRM software require when they are set up is making the cost of switching to another player seem very high—and the decision to switch a difficult one.

It is therefore clear that in this race to onboard these large, clunky CRMs, we have stopped questioning the NIL to the minimal impact such clunky software have had on our business.

Takeaway 2:

Going with the Word's #1 CRM may not bring you the desired business results. Asking the right questions and challenging the status quo may be the best way to ensure that the investment you make in your CRM delivers on the business metrics important to you. And if it doesn't, it may be time for you to consider alternatives to your existing CRM.

In this context, it is no surprise that 2 out of 3 businesses like yours want to dump their CRM

1. <https://www.csoinsights.com/wp-content/uploads/sites/5/2018/12/2018-2019-Sales-Performance-Report.pdf>



CHAPTER-3

Legacy CRM: Built for the Emperor, not the Commoner

When you think about it, legacy CRM software were NOT designed keeping in mind the objectives and goals of YOUR salespeople. They were built for the most senior leader in your organization, to serve their requirements for reporting and forecasting on business metrics. However, when salespeople, the real users, started using the system, the kind of features they needed became add-ons and in most cases, required integration with additional tools,

adding not only cost but also complexity to the existing CRM system. Now for integrating and maintaining all those tools with your CRM, you needed specialized teams. Finally, when your CRM solution was ready, your own sales teams felt it was unintuitive and therefore hardly used it. It felt costly and complex and just not RIGHT.

Your salespeople grumbled, but things did not change. And you felt stuck.

This is what led to the silent revolution.

Let's now take a deeper dive into its drivers.



Bloated with unnecessary features and functionalities you will never use
(43% of CRM users use less than half the features of their CRM system¹)



Unintuitive UI that is not user-friendly
(Sales professionals spend 2/3 of their office hours on administrative tasks like CRM software management²)



Heavy reliance on IT teams for deployment and maintenance



Highly complex and needs to be customized heavily to suit your business needs



Is difficult to integrate with existing systems



Lack of democratic design

1. <https://financesonline.com/crm-statistics-analysis-of-trends-data-and-market-share/>

2. <https://www.csoinsights.com/wp-content/uploads/sites/5/2018/08/2018-Sales-Operations-Optimization-Study.pdf>



Existing CRM tools don't reflect today's customer relationship models

Customer journeys today involve multiple touch-points and hundreds of interactions for a business like yours. And businesses that have adopted the World's #1 CRM, thinking it is the 'best', are now noticing that neither does their CRM reflect their customer relationship model, nor does it empower the more meaningful customer engagement that businesses like yours are trying to pursue today.

As per the CSO Insights Sales Performance Report, better customer relationships were reported to have a significantly greater impact on closing/win rates. For example, when your salespeople evolve into "Trusted Partners" for their prospects, the win rates increase by a significant 20 percent.

Insignificant improvement in win rates and quota attainment

Based on the 2019 Sales Performance Report issued by CSO Insights³, we believe Legacy CRM solutions have not helped a majority of businesses such as yours achieve the outcomes you had hoped for. Improvements in business metrics are insignificant, if not absent. Figures indicate that quota attainment has not registered any significant improvement, standing at 54.3% in 2019 which is barely up from 53.0% in 2017, while win rates are stagnating at 47.3%, the same percentage as in 2018.

The latter means that sales teams are still closing less than half their forecast deals.

Sales teams are still closing only

50% of their forecasts



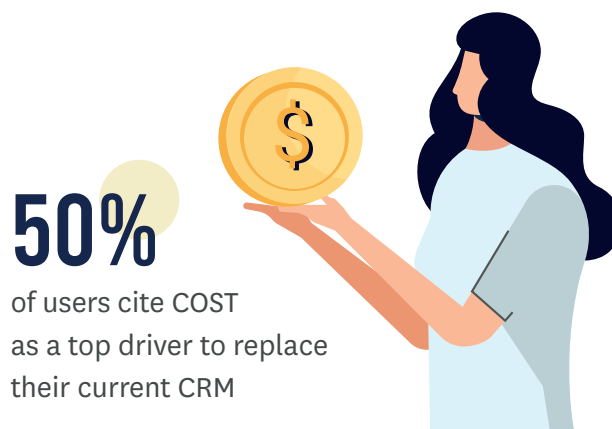
3. <https://www.csoinsights.com/wp-content/uploads/sites/5/2018/12/2018-2019-Sales-Performance-Report.pdf>



The same study also highlights that on **16 different activities undertaken by sellers**, from needs analysis to cross-sell/upsell, prioritizing prospects and more, **sales leaders like you considered their teams to be less effective in 15 of the 16 activities than they did in a similar study conducted five years ago.**

1 out of 2 users find Legacy SaaS CRM unaffordable, too expensive

As per the Forrester study, cost emerged as the top driver for businesses to want to dump their existing SaaS CRM, with 50% of respondents citing it as a key factor to drive change. We believe that the reasons for it range from opaqueness and lack of transparency between quoted vs. post-implementation costs, to a chock-full suite of not-so-relevant features that bloats the price.



Low morale and frustration drive high churn rate among sales teams

When the bottom-line doesn't grow, something's gotta give. And this is exactly what large, clunky CRMs have achieved.

Salespeople are being held back by time-consuming and complicated CRM systems that require juggling between multiple tools and a large volume of data entry, which is impacting their productivity.

In such scenarios, it is but natural for sales leaders and other functional counterparts looking for improved metrics to blame the sales teams for low efficiency rather than identifying the Legacy CRM as the possible cause. This frustration with a complex system and it hindering than enabling them to achieve their targets is depleting employee morale and triggering a high churn rate with a lot of businesses losing their star salespeople.



So what does all this really mean for YOU?



Does this mean that **CRM leaders have failed businesses like yours?**
There is no right or wrong answer to that question.

And maybe the question is not whether CRM leaders have failed or been successful; whether they are the biggest, the best or world's #1 in the marketplace.

The question is whether these CRM Leaders are RIGHT for YOUR business.

Sales leaders like you need a CRM system that provides greater visibility into your prospects' needs, journeys and touch-points, and helps develop trusted and strategic relationships with them, rather than one that is process-centric, an approach that worked well in the past, but is no longer relevant in the relationship era.

The Right CRM software, born in the new wave of SaaS, is built on a different philosophy.

The Right CRM is customer first, flexible, and intuitive, characterized by democratic design, are TRULY enabling your sales teams to become more productive and efficient—by simplifying the user experience, enhancing automation to replace time-consuming processes, and leveraging customer data like never before. By helping you align everything with how customers wish to solve their business problems, the Right CRM solutions are creating space (and time!) for your sales teams to develop holistic customer relationships, better customer engagement, enhance team productivity and effectively scale opportunities.

Takeaway 3:

One size often does not fit all. If 2 out of 3 businesses like yours are ready to dump their current CRM, maybe it's time to get a fresh perspective to evaluating sales success. Maybe its time to place your business goals at the core of your CRM investment decisions, to select not the so-called-best CRM, but the Right CRM.



CHAPTER-4

Challenges being faced by businesses like YOURS with existing CRM solutions

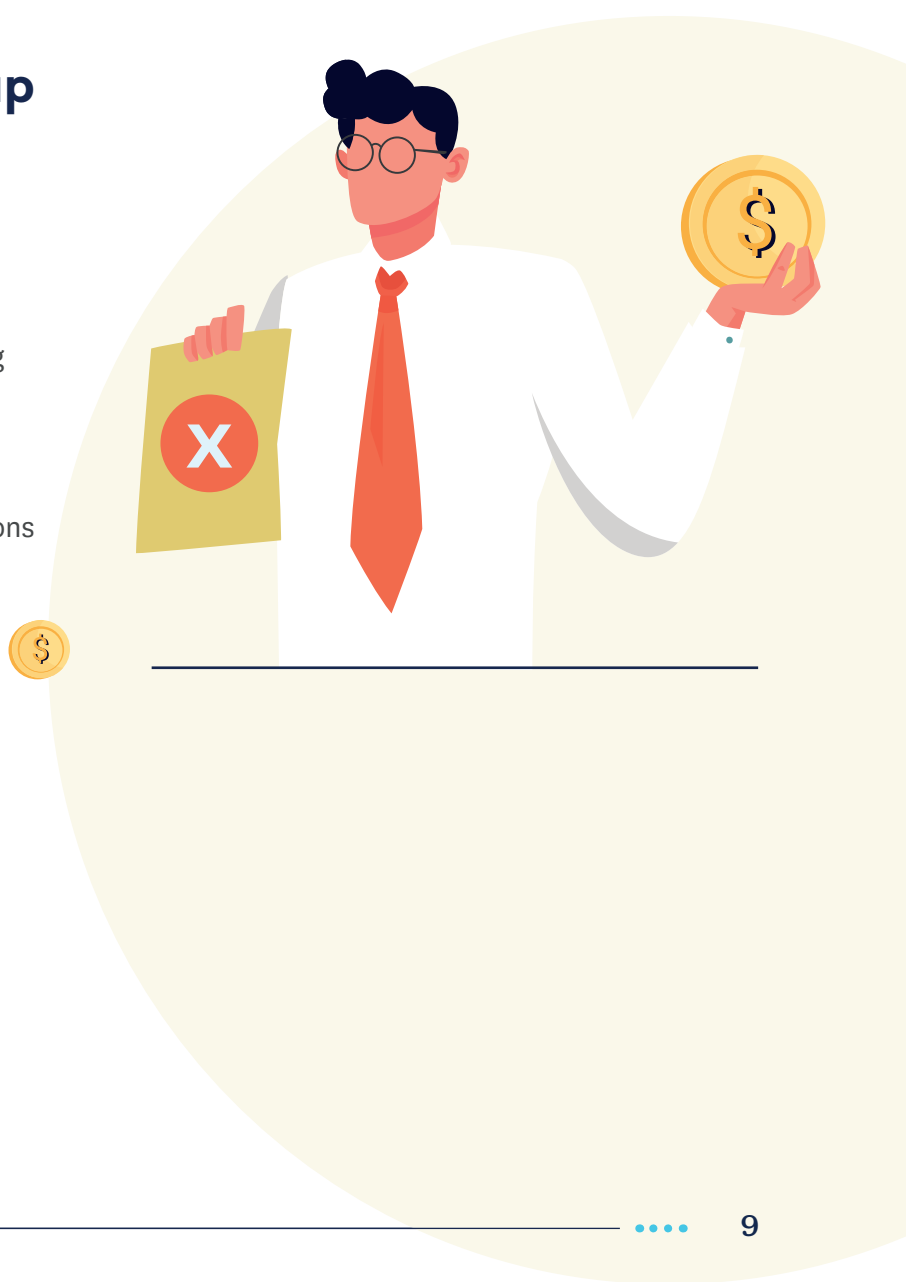
(Things YOU should know before selecting YOUR CRM)

From upfront and ongoing costs to poor user adoption and difficulty in gaining insights, businesses like yours are finding that Legacy CRM solutions are not agile enough at scale. Operations are often limited by the excessive customization required by these Legacy CRM

tools to make the system work for you. And even after that, when you don't get the insights you need to make business decisions or drive productivity, it leaves you and your salespeople wondering if your lives may have been easier relying on spreadsheets!

Costs: What you sign up for is not what you get

Businesses like yours often incur a high cost of entry when deploying Legacy CRM solutions. A lack of transparency in pricing means hidden charges for things like implementation, training, add-ons, etc. As many as 46% of buyers as per the Forrester study find their SaaS CRM solutions to be costly, including both upfront and hidden or incremental costs.





Added services

Key services and features—for example, data migration—can attract charges in addition to the price on the label.



End-user training

Training costs can be a drain on your resources and productivity. Training staff to operate complex software involves costs associated with hiring subject matter experts, as well as certification and licensing fees associated with each user.



Integration costs

Businesses are often unaware that their CRM of choice may require changes in their existing systems for the software to function, which can be a surprise cost that adds to the burden of high upfront expense.

“What are the top challenges with your current SaaS CRM solution?” (Select up to 5)

Expensive upfront costs

31%

Reliance on IT to set up and make changes

27%

Difficulty integrating with other systems

25%

Expensive incremental and/or hidden costs

20%

Long-term contract commitment

19%

Difficulty training users on the system

19%

Difficulty creating a single 360-degree view of the customer from CRM data

18%

Too much customization required to make the system work for us

17%

Poor user adoption

17%

Difficulty in getting insights to drive business decision making

16%

Base: 156 CRM buyers in the UK, US, and Germany

Source: A commissioned study by Forrester Consulting on behalf of Freshworks, September 2018



Why your CRM solution shouldn't actually be expensive

The Right CRM software offers more functional flexibility at lower price points than ever before. Here are a few reasons why cost should no longer be a factor when choosing your CRM solution:



Low deployment costs:

Available as subscription services that can be customized, deploying the Right CRM system can be as simple as creating a package that suits your needs, signing up and getting started right away.



No need for dedicated IT teams:

SaaS CRM software is often backed by the IT team of the solution provider, eliminating or reducing your need for in-house staff providing technical support for your CRM solution.



Minimal reskilling and training:

Intuitive and user-friendly new CRM software is disrupting the paradigm established by Legacy solutions, helping to reduce your costs related to training users.



Fewer limitations on integration and scalability:

Cloud-based SaaS CRM solutions can easily integrate with your existing systems and respond to future needs.



One-stop solution:

All-in-one solution with phone, email, and SMS, as well as lead scoring, event tracking, live chat, etc. within the same solution, eliminating the need to invest in additional tools constantly.

Reliance on IT is driving 35% of businesses to replace their current SaaS CRM

Legacy CRM solutions often require teams of specialized IT professionals to enable them to function to their optimal extent. This requires an ongoing allocation of resources, but more importantly it also constitutes a single point of

failure that can compromise your entire sales operation. Thirty five % of respondents in the Forrester study cite reliance on IT teams to make changes to their current SaaS CRM solution as a key driver for dumping their existing CRM.



UI is not intuitive

The objective of a CRM is to capture relevant customer-account and interaction-related data and provide the right information at the right time to help your sales teams better engage with customers. But in reality, many of the most established brands in the space are not user-friendly or easy to operate. They have complex interfaces that complicate the task of the end-user rather than simplifying it¹.

For example, sales professionals have been known to spend up to two-thirds of their office hours on administrative tasks like CRM software management². As a result, many large, clunky CRM solutions require extensive training and complex on-boarding processes for them to deliver value. The result is low productivity, inefficient user adoption, and extended time-to-value.



1. <https://blog-assets.freshworks.com/freshworks/wp-content/uploads/2019/10/14072553/Riding-The-Next-Wave-Of-SaaS-CRM-.pdf>

2. <https://www.csoinsights.com/wp-content/uploads/sites/5/2018/08/2018-Sales-Operations-Optimization-Study.pdf>



43% of users use less than half the features of their CRM system

A CRM is only as good as its most useful functionalities. Think about it, if the features in a CRM are neither useful nor relevant, or accessible intuitively using the solution's user interface, what does that say about the utility and value of the CRM for your business? Research confirms that 43% of CRM users like you are

using less than half the features of their Legacy CRM system³. This impacts ROI as businesses like yours pay top dollar for software with a bloated features suite that is not utilized fully.

Further it makes navigating to features—that your teams actually find useful—more complex and difficult.

Locked into long-term contracts

Several established CRM solutions require you to sign long-term contracts before you can derive any real value from the product. In the event you find a particular CRM software inadequate for your needs, the only available option is to invest in add-ons or third party solutions. To be successful in a highly

competitive and disruption-prone business climate, a contemporary business like yours needs to be agile, responsive and flexible with its overheads. Lock-ins can only serve to force you into using a product that does not fit your needs.

Difficulty in creating a 360-degree view of customer

Clunky CRM solutions deny businesses the opportunity to gain a holistic view of their customers. Since data is scattered around the entire system, it is difficult for you to get a 360-degree-view of your customers in a single dashboard. Contemporary businesses like yours need to be able to track, integrate, analyze, and

leverage data gathered across all touch-points and the entire customer lifecycle. Legacy CRM software often requires you to either upgrade to gain a comprehensive understanding of your customers or is simply unable to deliver insights in a user-friendly manner.

3. <https://financesonline.com/crm-statistics-analysis-of-trends-data-and-market-share/>



Lack of insights for business decision-making

In addition to addressing the needs of your sales team, a CRM solution should ideally also assist you in driving big-picture decision making within the organization. Reliance on your sales teams to

enter customer data—which they may not do at times may not, or may input it incorrectly—can lead to inaccuracies, making it difficult for you to get actionable insights to guide your top business decisions.

Excessive customization required

Ever heard that too much of something is bad? Customization is one of them.

Many established CRM solutions available today are extremely limited in their ability to meet specific business needs in their unaltered state. A one-size-fits-all approach is an inherently sub-optimal approach, and especially so in the highly competitive world of sales. Legacy CRM solutions often require extensive customization prior to being able to deliver value. What makes this limitation worse is that the process involved in making these alterations is usually cumbersome, limited in scope, and requires extensive intervention by specialized IT professionals.



Takeaway 4:

The list of CRM challenges can serve as a guide to help you with what to watch out for when choosing the CRM solution to best serve your business needs—hidden costs, unintuitive interface, reliance on IT, excessive customization, bloated feature suite, are all red flags that can and should be avoided.

CHAPTER-5

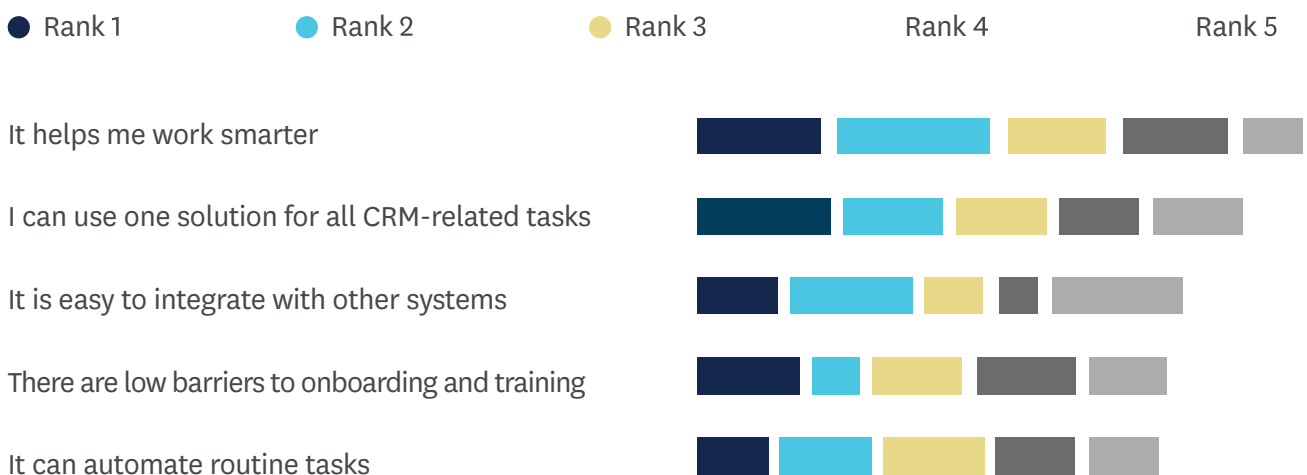
What do businesses such as yours ACTUALLY need from their CRM software

(The Wishlist)

Ultimately the reason why businesses like yours opt for a CRM solution is not only to engage a new generation of empowered and opinionated prospects and customers more effectively and grow your pipeline, but also so you can empower your largely millennial sales teams with business tools that aid their efficiency and productivity.

Being clear about your specific business goals and objectives can help you steer clear of a bloated CRM that boasts 500 features, when the *Right 50 at the Right price* could do the job more effectively for you.

“What are the most important qualities of an ideal CRM system?”



Base: 163 CRM users in UK, US, and Germany

Source: A commissioned study conducted by Forrester Consulting on behalf of Freshworks, September 2018

Delivering value across the entire customer lifecycle is a start, but consistently exceptional customer experiences are the real key. You need a CRM software that provides competitively priced support for your entire sales process, from identification of leads to following up with prospects to easing the flow of the sales pipeline to empowering your teams. Based on the Forrester study we have created a list of the top needs that businesses have identified as priorities, when assessing their CRM solutions:

Low Upfront and Ongoing Costs is the top driver for replacing existing SaaS CRM according to buyers

Capex and opex costs can both add up when businesses like yours consider options for the ideal CRM system. A low initial cost is obviously a plus, but you are also looking for solutions that allow you to map features to your exact needs, so you are not paying for functionality you never use. You want to be able to scale up the data throughput and the number of users your CRM can supports, as your needs grow—and you should be able to do so at minimal additional expense.

“When we first bumped into Freshsales, we noticed that this agency CRM software is incredibly easy to use, very intuitive and affordable for the range of features it offers on the platform. That counts for a lot in our nature of work. We are always doing things fast and furious and we don’t have the time to stop and learn a new piece of software. We hardly even had to access the documentation. Everything was right where it is supposed to be.”

Laura Cuttill, Practice Lead, Advertas

“Freshsales is extremely flexible in terms of customization. I have looked across multiple offerings with all the other big and some small names out there. Freshsales has provided me with a solution that I can now role out to the rest of the team and a cost-effective price. Also, in my industry, compliance and regulation is exceptionally important. Freshsales allows me to build in any check I want, and to provide any report I might need from an auditing perspective.”

Brad M, Director



“With Salesforce Enterprise, we felt the value to price ratio started to go south. Paying for a name brand is no longer valuable rather paying for a platform that works with 24x7 support at an affordable price point is what we needed and Freshsales delivered that to us. Though the experience, we decided to add Freshdesk and Freshchat an additional two modules. We are very happy with our decision and highly recommend Freshworks to small and large enterprises.”

Stephen M, Head of Growth Strategy

**All-in-one solution:
built-in functionalities
to support sales is
the second most
important quality of a
CRM solution for users**

Businesses such as yours are looking for an effective CRM solution that goes beyond being a sales automation tool. You need your CRM to have built-in functionalities to support your sales teams without their having to juggle between multiple applications. And to also have the capability to integrate all sales and customer support, while enabling data-driven optimization.

“I like the fact that Freshsales allows you to keep track of all your clients and leads data, this optimizes the work being done. It is incredible all that you can keep in a single place, emails, calls, notes, task management, tracking website events and this way you are able to see what your clients and leads are most interested in. It also allows you to see if there are duplicates and you can merge them to obtain a single profile with all the information in a single place. You can also get notification on the emails your leads and clients have opened up, this way you are able to see if they are really interested or not.”

Andreina M, Leads Rep



“Freshsales made it easy for my sales team to keep track of their prospects all the way through the sales cycle. Did not cost our company much money at all and was very easy to implement! Freshsales makes creating and tracking leads for our financial services firm a breeze. You can integrate it within your email in order to track your prospects behaviors, which is extremely helpful. Makes your life easy when it comes to managing your deals and creating reports to track your progress. It is also very inexpensive for what you get! There are other CRM software packages out there, some of which offer more features than Freshsales. In my opinion, Freshsales provides the most “bang for your buck” when it comes to a CRM system.”



Christopher F, Financial Wholesaler

“One of the biggest reasons we signed up with Freshsales was because both software belonged to the same parent company, Freshworks. So we wouldn’t have to move data between two different solutions. The integration was seamless. The implementation and onboarding for Freshsales was very helpful. The CRM is very user-friendly and intuitive, and it was very easy to set up. In fact, after we attended Refresh 18, the user conference organized by Freshworks last year, we became more involved in using the CRM actively. We learnt how to set up sales campaigns and workflows, and it is proving to be advantageous for us.



Cara Herbig, Global Accounts Manager, iotum

Personalized customer experiences with 360-degree view is one of the top challenges for buyers

According to Accenture’s ‘Personalization Pulse Check 2018’ report, 81% of the customers surveyed wanted businesses to understand them better and identify when to initiate contact and when not to pursue them. Businesses such as yours need CRM solutions to create comprehensive records of customer interactions and effectively leverage that data to empower personalized communication. You want your CRM solution to respond to these and other customer needs through effective Customer Portfolio Analysis. You want enhanced value propositions for your customers as well as your own operations.



“Two years ago, we couldn’t measure our conversion rates. We didn’t know which leads went from sign-up to demo, to closing. Our account executives didn’t know where our deals are coming from, how each deal is progressing, at which stage the deals are dropping off, where they should focus their efforts and more. We were able to do all this with Freshsales CRM. And these metrics have helped our MRE, SDR and other teams beat all records in Chargebee history on the number of leads enriched, number of demos booked, pipelines created, deals closed, and more.

Germaine Brion, VP-Sales, Chargebee



“Freshsales is being used by my company as a single point of contact for all of our lead and prospect database. We use it to warehouse all of our client and account information and is the tool that we use for all of our calling out for lead and prospect generation. I am able to follow the lead from the initial point of contact through out the entire lead and sales cycle and then once they are a client I can use Freshsales to do all reordering and account management. Along with the mobile application on my mobile devices Freshsales has to be one of the most extensible and robust sales tools that I have used since Salesforce!”

Rudy Veve, Business Development Manager, Z-Axon Inc



“On an average, we have closed around 40% more deals compared to earlier, when the leads were just sitting and we had no insight into how we should engage with them”

Santosh Panda, Founder and CEO, Explara





Easy to learn and use is an important quality for users

Disruption, downtime or even lowered productivity is unacceptable for the modern organization such as yours. Taking a cloud-based SaaS approach, the Right CRM is virtually plug-and-play and businesses are showing a distinct preference for this model. You need your CRM solution to deliver no-pain installation and minimal need to skill users.

“Freshsales is aptly named—a fresh and clean interface. It’s a simple and easy-to-use CRM that stands out from the rest in both functionality and adaptability.”

”

Aashray Patel, Partnerships and Marketing, Beyond Travel

“Freshsales allows us to focus on converting our leads. The interface is so intuitive that our new sales staff do not require training on how to use Freshsales, they just hit the ground running.”

”

Chris Gaulin, Product Manager, Fastoche.ca

“Overall experience was phenomenal. It captures the entire sales flow from capturing leads to nurturing them and closing deals with a seamless easy to understand interface. Keeps various sections of the sales organization in the same page and informed during the entire flow.”

”

Aditya S, Pre-Sales/Product Consultant - Strategic Accounts



Mobility

In our hyper-connected world, sales teams need on-the-move and round-the-clock access to systems and data. Mobile access is one of the most powerful drivers for businesses taking the cloud-based SaaS option in their CRM solutions. No contemporary sales operation can think of itself as truly competitive in the absence of these capabilities.

“When I’m on the road, I find it easy to go through my tasks and make calls on the go.”

Jeff Harris, Vice President - Business Development, TRIBUS



Takeaway 5:

Seek what you need and you shall find it. The Right CRM solution is affordable and features Intuitive Interfaces, plug and play functionality and democratic design. Businesses like yours need to be particularly decisive in identifying solutions with features and an ROI profile that best suits your business model. Your business and your team need you to make the right decision to empower them.



CHAPTER-6







Freshsales may not be the World's #1 CRM, but it may be the 'Right One' for YOU

So why could Freshsales be the 'Right CRM' for YOU?

By now we already know this that simply investing in any CRM solution, even the World's #1, is not enough. Challenges with large, clunky CRMs range from stagnant win

rates and quota attainment (CSO Insights) to a growing focus away from the core job of selling to more administrative tasks, low end-user adoption, a slow user learning curve, and the lack of an integrated all-in-one-solution (Redspire, MyCustomer).

For a CRM to be truly beneficial for a business like yours, it needs to be able to deliver on your Wishlist.

- | | | | |
|---|--|---|---------------------------------------|
|  | Improve your business metrics—pipeline growth, win rates, and quota attainment |  | Build stronger customer relationships |
|  | Increase your sales productivity |  | Boost sales retention |
|  | Grow your topline |  | Happy and motivated sales team |

1. <https://www.csoinsights.com/wp-content/uploads/sites/5/2018/12/2018-2019-Sales-Performance-Report.pdf>

2. <https://blog-assets.freshworks.com/freshworks/wp-content/uploads/2019/10/14072553/Riding-The-Next-Wave-Of-SaaS-CRM-.pdf>

3. <https://redspire.co.uk/wp-content/uploads/2017/07/The-ultimate-guide-to-why-slow-user-adoption-affects-49-of-CRM-projects.pdf>

4. <https://www.mycustomer.com/selling/crm/crm-metrics-what-should-you-monitor-and-measure>



Freshsales: The inside story

We launched our first product, Freshdesk, back in 2011. By 2012, a growing business and contact list compelled us to implement a popular CRM. Our needs were similar to those of other fast-growing SaaS companies.

Once we implemented the CRM, we ended up having to buy more tools to fulfill what we thought were basic needs from a CRM. For example, we had to buy a separate tool for setting up sales sequences, another for email tracking, another for lead scoring and yet another to integrate event analytics into the CRM to provide context to our salespeople on the leads' behavior on our website and inside our product during trial.

And to get all this, our first-step had to be to sign up for the highest plan to get API access on the CRM. Apart from this cash investment, we had to invest significant developer resources in integrating all these tools and making everything work together seamlessly. But, by the end of all this effort, what we had was a very complex CRM that required our sales reps to juggle multiple tools to get client context and make personalized, meaningful conversations, among other challenges. This eventually led to the CRM becoming a mere manual dumping ground for information instead of a productivity boost.

As a SaaS company, we knew there had to be a better way to do this.

Freshsales: The birth of democratic design

Armed with our expertise and the Freshdesk product, we decided to create an agile solution that would work for our specific needs and empower our team.

The end result (or should we say the beginning) was **Freshsales**, a CRM built on the philosophy of democratic design that has since become the **right** choice not only for our sales team, but also our happy customers worldwide. And that's not all. Freshworks has been one of the **fastest players** to enter the 2019 **Gartner Magic**

Quadrant for **Sales Force Automation** joining the ranking in 2019⁵. It has also been reviewed as **the software with the fastest payback time on G2**⁶!

We built a CRM because existing CRM tools despite being market leaders, did not work for our needs. And if *your story* is anything like ours, and if our CRM implementation journey sounds familiar, then Freshsales may just be the Right CRM for YOU.

5. <https://www.gartner.com/doc/reprints?id=1-W9M9SD6andct=190628andst=sb>

6. <https://www.g2.com/products/freshsales/reviews>



What you get with Freshsales

As an end-to-end solution, at an affordable price point, Freshsales liberates your salespeople from the drudgery of repetitive tasks, freeing them to actively build customer relationships and pursue customer engagement.

Unlike many widely used Legacy solutions, Freshsales has built-in phone, email management, website and in-app tracking—essential features that help your sales team get a 360-degree view of the prospect to have engaging conversations and sell better.

You can do it ALL from the Freshsales CRM platform



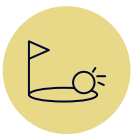
Attract

Attract leads from multiple sources. Create personalized campaigns and optimize your website to maximize conversions.



Engage

Engage in contextual conversations with leads on multiple channels like phone, chat, email, and social.



Close

Harness the power of AI to surface hot leads, identify promising deals, and build a strong sales pipeline.



Nurture

Help customers grow by staying on top of their needs. Develop long lasting-customer relationships.



Additionally, the CRM offers the following benefits

- Easy to deploy and use
- Affordable. No additional add-ons and hidden charges
- Pay as you go and as your needs evolve
- Automates repetitive tasks
- Free support

And all these benefits come to you with no restrictive, lock-in contracts.

Takeaway 6:

Freshsales is a lean, agile, affordable and powerful new-age CRM solution that welcomes you to a new world of democratized technology, where gaining access to full-spectrum functionality doesn't involve exorbitant costs. Salespeople love Freshsales, as it empowers them with relevant information to boost customer engagement while automating their workflow so that they can focus on what they do best—selling.



Now isn't this your Wishlist come true?



Freshworks provides customer engagement software to businesses of all sizes, making it easy for customer support, sales, and marketing professionals to communicate more effectively with customers and deliver moments of wow. Freshworks offers a full suite of SaaS (Software as a Service) products that create compelling customer experiences and lets businesses share a 360-degree view of relevant customer information internally.

Founded in October 2010, Freshworks Inc. is backed by Accel, Tiger Global Management, CapitalG, and Sequoia Capital India. Freshworks is a 1,800+ team headquartered in San Mateo, California, with global offices in India, UK, Australia, and Germany. The company's cloud-based suite is widely used by over 150,000 businesses around the world, including the NHS, Honda, Rightmove, Hugo Boss, Citizens Advice, Toshiba, and Cisco.

For more information, please visit www.freshworks.com.