



## Case Study:

Unifying Email, Phone, and  
SMS Communication with  
**ConvergeHub**



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## Industry

Professional Services – Multi-Business Operations

## Engagement

Ongoing Engagement

### Services Delivered to Client

Integrated email, phone, and SMS in ConvergeHub CRM with unified tracking and automated engagement workflows.



### Key Business Problems and Operational Gaps

An established professional services struggling with fragmented communication systems needed a CRM to unify channels and customer engagement. The core challenges included:



## ❖ **Disconnected tools and fragmented workflows:**

Previous CRMs lacked native email, phone, SMS support, causing inefficiencies and duplicated effort.

## ❖ **Limited visibility and tracking:**

Teams couldn't reliably monitor emails, opens, or connect communication efforts to prospects.

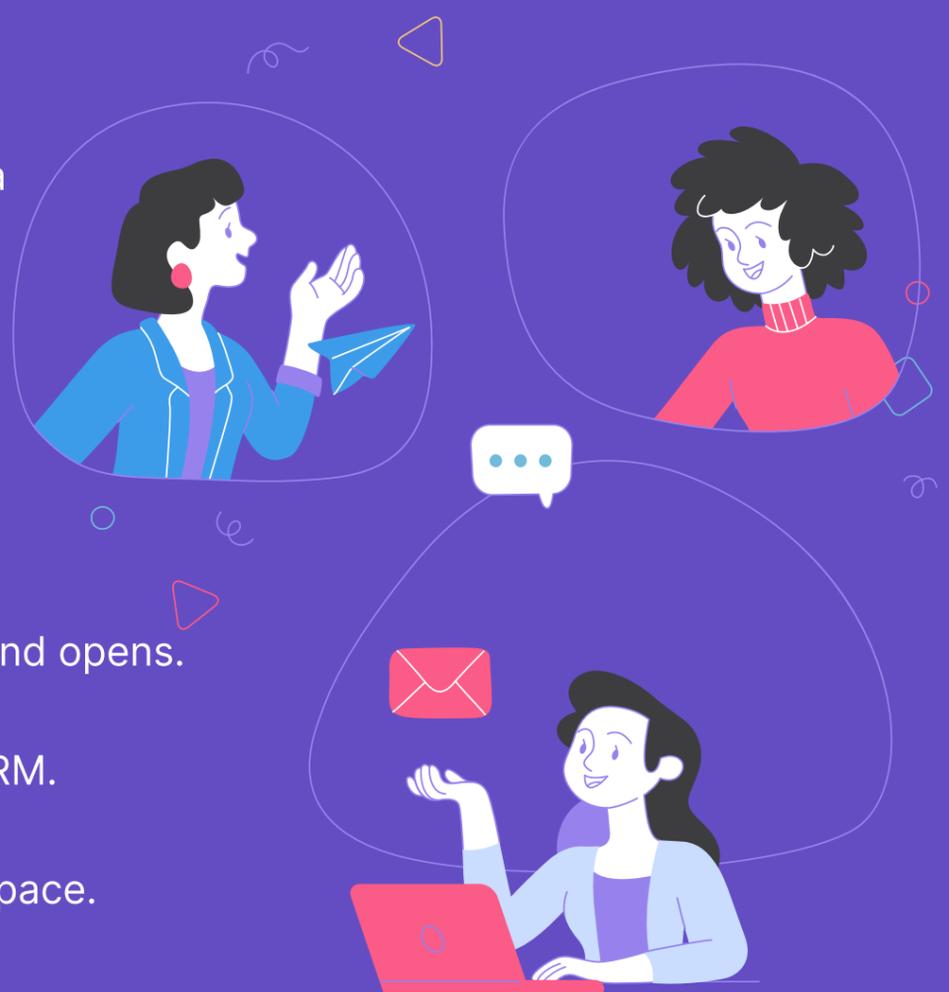
The organization needed a single, integrated CRM platform that could centralize all customer communication, eliminate reliance on external tools, and provide clear visibility into every interaction.

## How ConvergeHub Addressed the Challenge

ConvergeHub resolved these issues by delivering a fully integrated communication framework within the CRM, removing the need for external bolt-ons and disconnected systems.

The platform enabled the client to:

- 01 Send emails with full tracking of messages and opens.
- 02 Make phone calls and SMS directly within CRM.
- 03 Log all communications in one unified workspace.





## Impact of the Implemented Solution

The implementation delivered measurable improvements across communication efficiency, usability, and operational consistency.

### 01

#### Centralized Communication

With email, phone, and SMS fully integrated into ConvergeHub, all customer interactions were captured and accessible from one system.



The organization eliminated the need for multiple third-party communication tools, reducing system complexity significantly.



All outbound communication was automatically logged, providing complete interaction histories without manual effort.



Teams gained instant visibility into email engagement, including confirmation of whether messages were read.



The ability to call or text directly from the CRM reduced time spent navigating between tools.



Follow-ups became more consistent, as every interaction was visible and traceable within the contact record.



Communication workflows became more reliable, reducing missed follow-ups and duplicated outreach.

### 02

#### Improved Sales and Engagement

Sales teams could now engage prospects across channels without switching systems or losing context.



3



### Ease of Use and Rapid Adoption

One of the most impactful outcomes was the platform's intuitive nature, simplifying workflows and empowering teams with seamless usability.

1

The CRM was mapped to the organization's processes within days, compared to weeks or months with previous systems.

2

Partners and staff reported that onboarding and day-to-day usage required minimal training.

3

The user interface and flexibility allowed teams to adapt the system quickly to different business models.

1

An estate agency business replaced a purpose-built but "clunky" CRM with ConvergeHub, achieving faster setup and better usability.

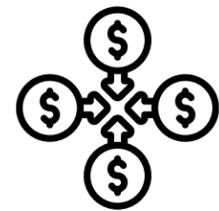
2

A camping and caravanning business initiated migration from KEAP to ConvergeHub to support higher levels of automation and integration.

3

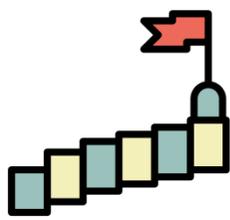
The decision to consolidate systems was driven by ease of use, flexibility, and seamless integration into daily operations.

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### Scalability Across Multiple Businesses

Following success in one business unit, the organization began standardizing ConvergeHub across other operations.



## Results Achieved and Business Impact

The adoption of ConvergeHub transformed how the organization managed customer communication across multiple businesses. By consolidating email, phone, and SMS into a single CRM platform, the team eliminated fragmentation and gained complete visibility into every customer interaction.

Communication became faster, more reliable, and easier to manage. Sales teams no longer relied on external tools or disconnected systems, allowing them to focus on meaningful engagement rather than administrative overhead. The ability to track email engagement and log all interactions automatically improved follow-up consistency and accountability.

### This operational uplift translated into measurable business impact:

- 1 Communication handling time **dropped by 35%**, as teams eliminated tool switching and managed email, phone, and SMS from one unified workspace.
- 2 Lead and customer response times improved by 25%, supported by real-time visibility into prior interactions and faster follow-ups.
- 3 User onboarding time reduced by 40%, with most staff becoming productive in days instead of weeks.



*The organization achieved greater consistency and scalability by standardizing communication workflows across multiple business units.*

In a nutshell, ConvergeHub enabled the client to replace complexity with clarity. By delivering an integrated, easy-to-use communication platform, ConvergeHub helped the organization operate more efficiently, engage customers more effectively, and build a scalable foundation for future growth.

