

How Shelton Development Services Experienced a 100% increase in sales visibility with Freshsales




Increase in Sales Visibility

100%

Increase in Revenue

8X

Decrease in Cost on External Tools

33%**INDUSTRY**

Real Estate Technology

LOCATION

United Kingdom

CHALLENGES

- Earlier used Maximizer CRM and BPM Online. Former was not cloud-based, came with limited customizations. Latter required heavy configuration and programming
- Needed a CRM that integrates with Freshdesk to provide seamless communication across support and sales team
- Needed to setup consistent customer follow-ups

HOW FRESHSALES HELPED

- Modern, cloud-based, all-in-one CRM
- Intuitive UI
- Easy to set up and customize
- Minimal onboarding
- Freshdesk integration + round-the-clock customer support

Founded in 1994, UK-based Shelton Development Services (SDS) designs and sells housing development services for customers in the residential housing sector. The company offers a host of products such as land appraisal tool, LandVal, development appraisal software, ProVal, project management software, Sequel, a housing development manual and so on. "We operate in the B2B space wherein we know all our potential customers because of the regulated nature of the social housing sector," says Phil Shelton, CEO, SDS. Its customers are typically housing associations and local authorities, and its goal is to sell its software suite to new customers who haven't used it before, and cross-sell or upsell the software to existing customers. "We have a two-pronged approach to business; we provide support to our existing customers and sell other software in our suite to them too," notes Shelton.

It is this approach to providing support and cross-selling to existing customers that led SDS to eventually setup and integrate Freshdesk support software with Freshsales CRM to improve its overall customer experience.

SDS Before Freshsales + Freshdesk

Prior to Freshsales, the team at SDS tried two systems. One was the legacy system, Maximizer CRM, which came with its own set of limitations, such as not being cloud-based, and having limited customizations. "It was restricted in terms of what you could do with it. It was also easy to lose information in the CRM because there were many sub-sections and additional fields dotted all over the place. It was hard to find out where the team was putting in information. This, as a result, made reporting a challenge too," explains Shelton.

The second move was to BPM Online, a US-based company which offers service sales, marketing software. "The second time around we wanted to use a tool which can integrate our support and sales process, because one of our biggest shortcomings was that salespeople and support teams didn't know what was happening with each other," says Shelton. For instance, an existing client may have raised a support query with the company, but the salesperson, unaware of it, would attempt to cross-sell another software to the customer. "As a result, the customer would ask; why are you trying to sell this when I have an issue with the existing software I use?" explains Shelton.

With BPM Online, Shelton tells us that while the implementation was fairly quick, it required heavy configuration. "It became clear that it was going to continue to require a lot of work. We needed to hire a full-time employee just for configuring and programming the software. In fact, we had a challenge with email integration as well because our support tickets weren't coming through properly," recalls Shelton.

As a result, SDS decided to go back to Freshdesk, the support software it was using prior to BPM online, and sign up with Freshsales to manage its sales process.

On moving to Freshsales, Shelton tells us that;

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"Within a week, we were able to migrate data from BPM Online to Freshsales and get up and running with the CRM. The usage with Freshsales is quite straightforward."

Phil SheltonChief Executive Officer
Shelton Development Services

On the Freshsales-Freshdesk integration, he opines;

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"The sales-support integration enables users of both systems to see what's happening with clients from a sales and service perspective; something that was very difficult before. Moreover, by also using Freshconnect, the collaboration tool by Freshworks, users can communicate effortlessly with each other about what's happening."

Phil SheltonChief Executive Officer
Shelton Development Services

Most Used Features

Contact Management: The team at SDS doesn't use leads because it already knows the potential pool of customers it is dealing with. Instead, it counts a lead as someone new within the customer's company and uses the contact and account module extensively. With Freshsales, the sales representatives are now able to identify, prioritize, and effectively communicate with contacts in the CRM.

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"Now, my sales team is able to keep track of who they are talking to. We can quickly see an activity timeline of each customer. From a management perspective, we can see who's closing what, which customer has bought which software, how many phone calls are being made, emails are being sent, demos are being made and so on. It also saves a lot of time."

Phil SheltonChief Executive Officer
Shelton Development Services

Sales Campaigns: This feature ensures that the SDS marketing team doesn't have to depend on an external campaign management tool.

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"The sales team can immediately see who's clicking the email, what are open rates, click rates, bounce rates and so on. It gives us improved visibility into how the campaigns are performing."

Phil SheltonChief Executive Officer
Shelton Development Services

Freshdesk Integration: The Freshsales - Freshdesk integration helps the SDS team get a holistic view of their customers and identify opportunities for cross-sell.

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"Overall, with Freshsales, we now have a repository of all our customers and prospects. We can access data on every single person who has ever done business with us, and generate reports on our overall business performance."

Phil SheltonChief Executive Officer
Shelton Development Services