

ACCELERATING YOUR DIGITAL TRANSFORMATION IN 2021



FRESH → START



FRESH → START

Accelerating out of Crisis with Digital Transformation



A few words from our founder

Undoubtedly, business over the past few months has been like never before. With the COVID-19 pandemic shutting physical stores, restaurants and offices the world over, organisations of all shapes and sizes were compelled to move every aspect of their business online and we were reminded of the power of technology as an enabler of success.

Some sectors have fared better than others at competing in the digital economy – adoption of [streaming services](#) and [video conferencing tools](#) have increased exponentially, while travel and hospitality have been hit hard. What's clear however, is that with great challenges, come great opportunities, and we are proud to have supported many businesses who have innovated to thrive in this new world.

It is often said that necessity is the mother of invention. Well, this has never been truer than right now. Innovation has been one of the great success stories of the pandemic, with

businesses around the world achieving in four months what previously would have taken years to accomplish. In the UK, [NHS organisations accelerated the adoption of new technology and digital solutions](#) in response to the crisis. Trusts such as Hertfordshire Community NHS Trust, Cambridge University Hospitals NHS FT and University Hospital Southampton NHS FT were called out as digital leaders for the roll out of video consultations for virtual ward rounds, the scaling up of existing patient record systems and the deployment of Microsoft Teams to automate tasks. In Italy, [huge investment in digital infrastructure and skills helped the city of Milan rapidly response to COVID-19](#). 7,000 municipal employees shifted to working from home relatively easily, ensuring public services were not disrupted.

As these examples highlight, digital transformation will be the backbone to success as businesses navigate this new era. Faced with crisis, SaaS has become an instant alternative



for many industries that were reluctant to make the move before. The rapid deployment of AI and automation in customer service operations is now a number one priority, helping call centre workers cope with a huge increase in enquiries. It's also no surprise that we've seen [increasing adoption of channels](#) like chat, as customers look to solve queries as quickly and easily as possible. Shifting to remote working overnight also meant communication between teams became critical; and operating in silos is no longer an option.

In this report, we look at how companies across the world have used technology to turn adversity into opportunity and make a fresh start. We explore three areas of business that can find success through digital transformation – customer experience, employee experience and sales.

In these times, agility is key to survival. Businesses that have been most resilient to the effects of the pandemic are those that have taken smart decisions and adapted their operations quickly and above all, listened to their customers' and employees' needs. At Freshworks, we are committed to helping you continue to deliver amazing customer experiences, especially in times of such uncertainty. As we look to move forward in this new reality, we are here to help you make a fresh start.

While often repeated, we are all in this together.

Girish Mathrubootham
CEO & Founder, Freshworks

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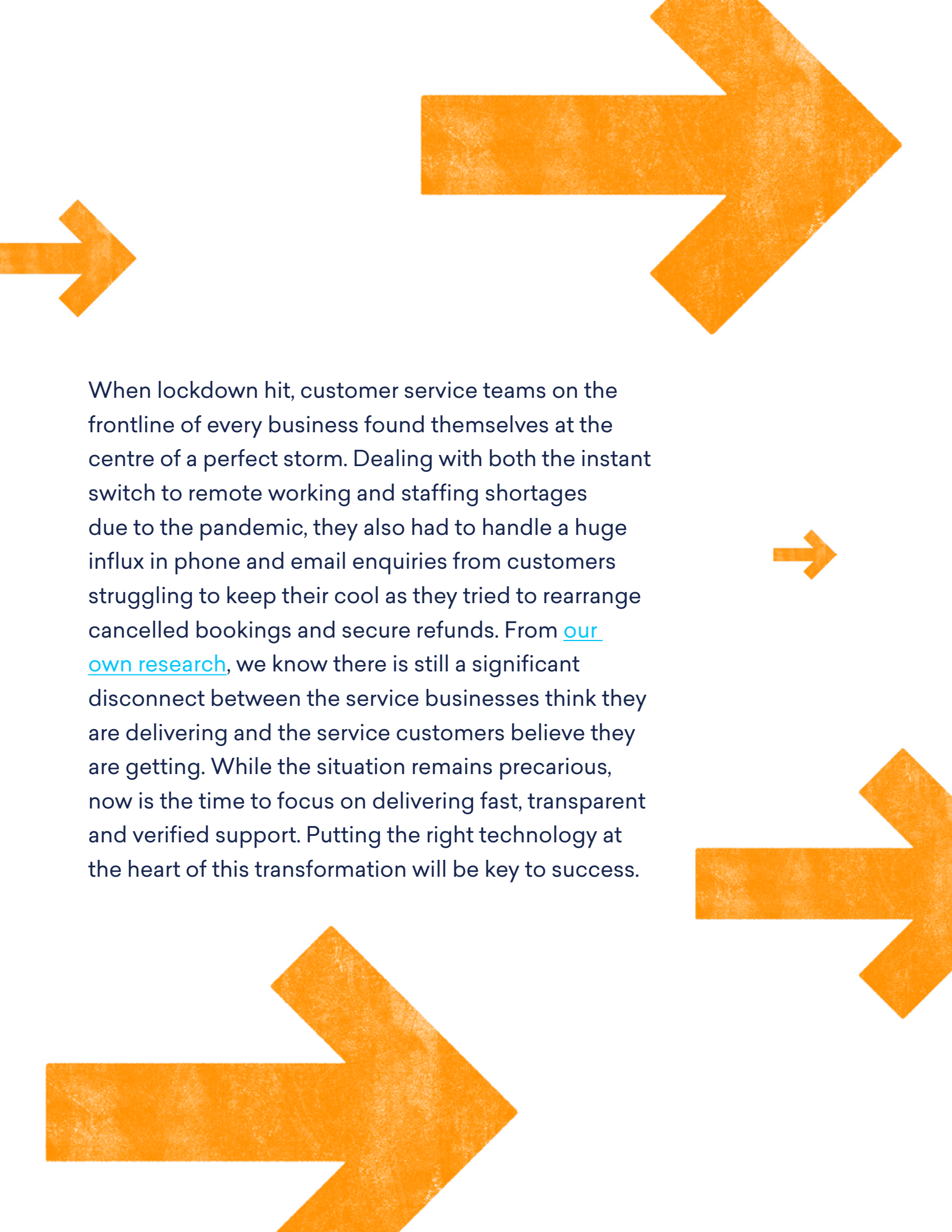
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THE NEW CUSTOMER EXPERIENCE





When lockdown hit, customer service teams on the frontline of every business found themselves at the centre of a perfect storm. Dealing with both the instant switch to remote working and staffing shortages due to the pandemic, they also had to handle a huge influx in phone and email enquiries from customers struggling to keep their cool as they tried to rearrange cancelled bookings and secure refunds. From [our own research](#), we know there is still a significant disconnect between the service businesses think they are delivering and the service customers believe they are getting. While the situation remains precarious, now is the time to focus on delivering fast, transparent and verified support. Putting the right technology at the heart of this transformation will be key to success.

Reimagining CX in the wake of the pandemic

Many businesses shifted their operations online to continue selling safely through the pandemic, with worldwide spending on digital transformation technologies and services expected to [rise by over 10%](#) in 2020. This has opened a vast array of new communication platforms on which organisations can engage with their customers. But businesses must ensure they are strengthening the bridge between their different channels to ensure a consistent customer experience. Omnichannel strategies have become a necessity, as companies find new ways to interact with their customer base on the channels they are using the most. Taking support to their customers rather than bringing them to support is critical.

Here are some useful tips for reinventing your customer experience with a supercharged omnichannel approach.

1

No one customer is the same:

People like to be treated as individuals and want to raise issues in the environments that they're most comfortable in. It's no good for businesses to invest heavily in one channel at the risk of another, as they could end up isolating a big customer segment.

Being able to support customers through email, phone, and chat services in a single, streamlined solution can help businesses deliver a better overall experience. The last thing customers want to do is repeat themselves when they switch between a chatbot interaction, text, email, or phone exchange. Offering a seamless experience means a customer's query is logged once and shared across all communication channels, reducing the likelihood of them becoming dissatisfied with the service they are receiving.

2

Look inward, as well as outward:

It's not just your customer-facing technology that you should consider, you also need to think about the internal systems that can actually help improve your target market's perception of the company. Taking an omnichannel approach to customer communication provides multiple platforms on which to collect customer data. With more data, you can build a better picture of the average customer journey – from awareness and consideration through to purchase – and deliver a better experience for each of them.

By offering your customers multiple touchpoints with which to interact with your brand, they can get everything they need from a single source of truth, without having to bounce between the channels.

3

Tweak and optimise campaigns as necessary:

To succeed in hitting the right tone, keeping existing customers and attracting new ones, you should understand exactly which marketing campaigns are resonating, and which aren't. The results right now are likely to be very different to 'business as usual' – so the approach taken needs to be tailored to each customer accordingly. Our research into sales leaders during COVID-19 found that 62% have directed their teams to spend more time in their CRM system, looking at what insights they can glean from it. The CRM system is a powerful tool for collecting data and learning more about each customer, with the goal of delivering a better experience and building the trust between buyer and seller.

Whatever systems you deploy, it's important to be mindful of how your customers want to interact with you, not the other way around. As customers look to support the businesses that are looking after them the most, offering a consistent experience across your channels is key to securing loyal customers and repeat business.

Smarter CX starts with AI

There is a growing AI revolution taking place in customer service centres. Our own [research](#) found that a quarter (25%) of businesses want to use the technology to improve their customers' experience of their brand. This is hugely encouraging for the industry as a whole, but organisations shouldn't invest in AI for the sake of it. They need to find areas in which its use will see most value.

For example, over a quarter (27%) of those surveyed in our [report](#) said that their biggest frustration when dealing with customer service agents was being left on hold for too long. This issue has been exacerbated further by the huge volume of enquiries customer support teams now find themselves facing, [with some customers waiting hours before getting through.](#)

AI-powered chatbots can remove some of this backlog by automating simple questions and routing customer chats that require urgent attention through to human service agents.

We know that consumers prize human interaction, especially during a time when that is so limited. For this reason, AI should only be brought in to augment, not replace human customer service agents. In doing so, businesses can develop AIs that mimic the behaviour of their best agents, while freeing up their time to focus on trickier cases. This will ultimately lead to more positive outcomes, better all-round customer experiences, greater brand loyalty and increased long-term value.



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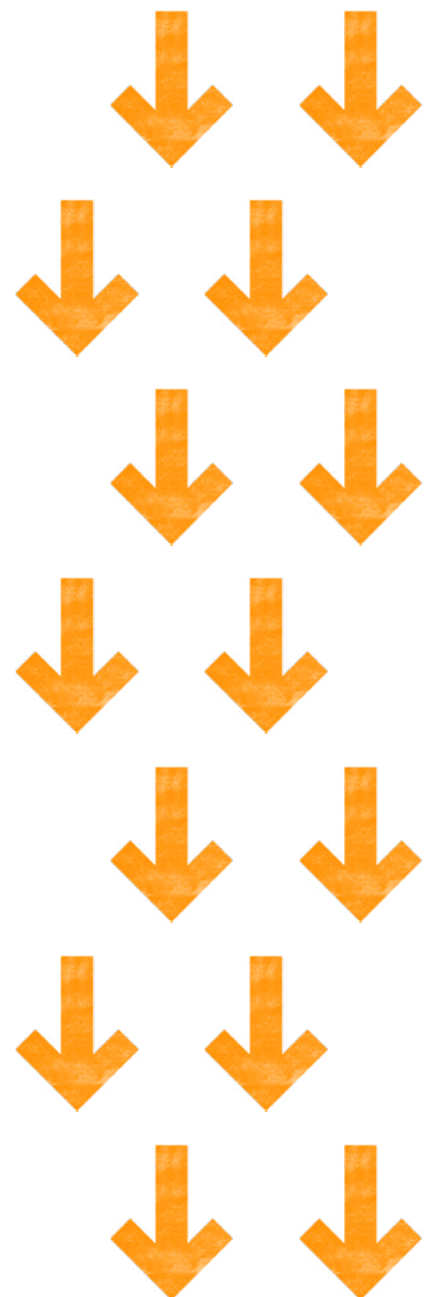
Industry spotlight: How retailers have innovated to survive

Already facing tough trading environments many high street stores pivoted sharply towards online selling to keep their operations running through lockdown. And we've seen a huge amount of innovation in the sector as a result. As one retail executive pointed out in a [McKinsey report](#), their business achieved two years of digital transformation in just two months. Those that didn't adapt paid dearly – Primark, for example, saw its sales fall [from £650m a month, to zero](#), as a result of having no digital presence.

With fewer shoppers venturing on to our high streets and [online sales soaring through lockdown](#), it's important that retailers can find new ways to support their customers on the digital channels they are on. For example, instant messaging has become the norm for rapid and transparent customer communication, with [WhatsApp alone seeing a 40% increase in usage during the COVID-19 crisis](#).

Our clients are leading the way in this revolution: with wellness company, Mecca Brands, using chat services to keep close to its customers and mitigate the impact from low store walk-ins, for instance. In this section, we put a spotlight on three businesses that have been able to deal with incredibly challenging working environments because of the technology they've invested in.

£650M A MONTH TO ZERO



Case study

Dune pivots to homeworking thanks to SaaS-based solution from Freshworks

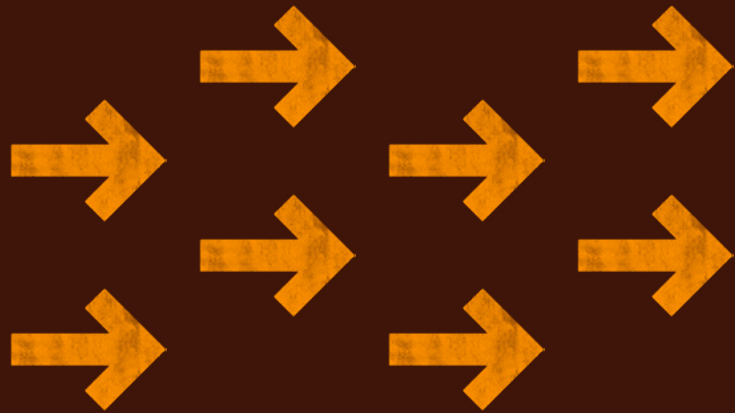
Like any business right now, fashion footwear retailer Dune had to adapt its offering to cope with the challenging business environment. With the closure of its offices, Dune's 2,000 staff members switched to remote working, a concept that was only starting to take hold at the company, overnight. Within the first week of its employees being sent home to work, Dune received a 500% increase in its calls to its customer support team.

"We saw a huge rise in the number of inbound queries to our customer service team, all 25 of whom were working from home. Our systems managed to hold up without a hitch and that's really testament to running our systems on a SaaS solution", said Dave Abbott, Head of IT Service Delivery, Dune. "Working from home was becoming a more accepted practice at Dune but given the pandemic caused our offices to shut, it became a reality in a matter of hours. We would have seen massive interruption within our systems had we not been using a SaaS-based solution."

Dune has been able to keep offering a range of communications channels, from email and phone to its increasingly popular chat engine and social media engagement. The retailer has also kept its customer service KPIs in line with pre-pandemic levels, thanks to Freshworks' suite of products.

“Thanks to Freshworks we are able to continue to deliver excellent customer service. We are looking forward to the future and what technologies we can deploy to ensure that our customers keep coming back to us and our teams are ready to support them. We are looking into how AI fits within the business and what opportunities this can offer our customer experience teams.”

FRESHWORKS SAAS SOLUTIONS ARE THE WAY FORWARD.



“For Dune it’s very important we have a strong relationship with our technology partners as it makes a real difference when we work together to deliver a great experience, both for our customers but also for our internal teams. Freshworks’ integration of its product suite has kept this process really tight over the last few months, allowing us to work together to deliver a better service for our customers. We have been trying to make things as easy and accessible as possible and Freshworks SaaS solutions are the way forward to enable that,” concluded Abbott.



Klarna.
Smooth shopping

Case study

Freshchat helps Klarna offer exceptional service to its 80 million customers

Online browsing and buying enjoyed a major boost through lockdown, and Swedish fintech company, Klarna, reaped the benefits by serving as a trusted payments provider with a variety of payment options to suit every type of shopper.

With over 190,000 merchant associations, shoppers have no shortage of options and are sure to find their favourite brands among this extensive list. It is no wonder that Klarna's unique payment system has become popular across the world. Klarna now boasts of over 80 million customers across 17 countries as it sets its eyes on new markets and merchants.

Offering exceptional customer service is vital for Klarna and it's an area that the business never compromises on. Consciously enabling the shift to chat as the preferred support channel has given customers instant interaction and has provided them with the solutions they need and expect. Unwilling to settle for less than excellence, Klarna opted for Freshworks' Freshchat service to support millions of interactions without a dip in quality, while at the same time, helping to balance the load between agents.

WE NEEDED A PARTNER THAT WOULD ITERATE FAST WITH US, LISTEN TO THE FEEDBACK, DELIVER THE FEATURES THAT WE NEED AND CONSTANTLY IMPROVE. FRESHWORKS HAS PROVEN TO BE SUCH A PARTNER.

“We needed a partner that would iterate fast with us, listen to the feedback, deliver the features that we need and constantly improve. Freshworks has proven to be such a partner”, said Tien, Product Manager, Customer Service, Klarna.

Before Freshchat, chat as a channel accounted for only 20% of service volumes with phone support accounting for 63%. Now, 66% of Klarna's customers turn to chat for support, bringing down phone support's tally to 32%.

With consumers set to continue their online shopping habits through the holiday season and beyond, being able to quickly respond to customer queries is vital. For Klarna, that's now a lot easier thanks to Freshchat.



Case study

Parcelhub responds to 100% spike in enquiries during lockdown

As the COVID-19 crisis hit the UK and retailers across the country closed their stores, delivery management and proactive tracking support company, Parcelhub's, business accelerated in order to fulfil increasing demand for online orders. In May alone, the business saw a 250% increase in the number of orders flowing through its doors. This also led to an increase in the number of tickets its clients' customers were raising, everything from delivery time to returns and social distancing enquiries. On a typical day, each of Parcelhub's 60 agents would normally handle 100 tickets each. During lockdown however, this doubled to 200 tickets per agent, per day.



tickets handled by
each agent every day
during lockdown.

“Our team was working at double their capacity. Our customers were handling requests on everything from sports equipment, to clothing, to home improvement stock and even essential items”, said James Hayes, director business development, Parcelhub. “As Freshworks’ client for a number of years, we are fully versed in the capabilities of its Freshdesk software and offer it as part of our service to our own customers. It was particularly valuable during the pandemic as it allowed us to alleviate some of the stress on the retailers by handling their inbound customer queries.”

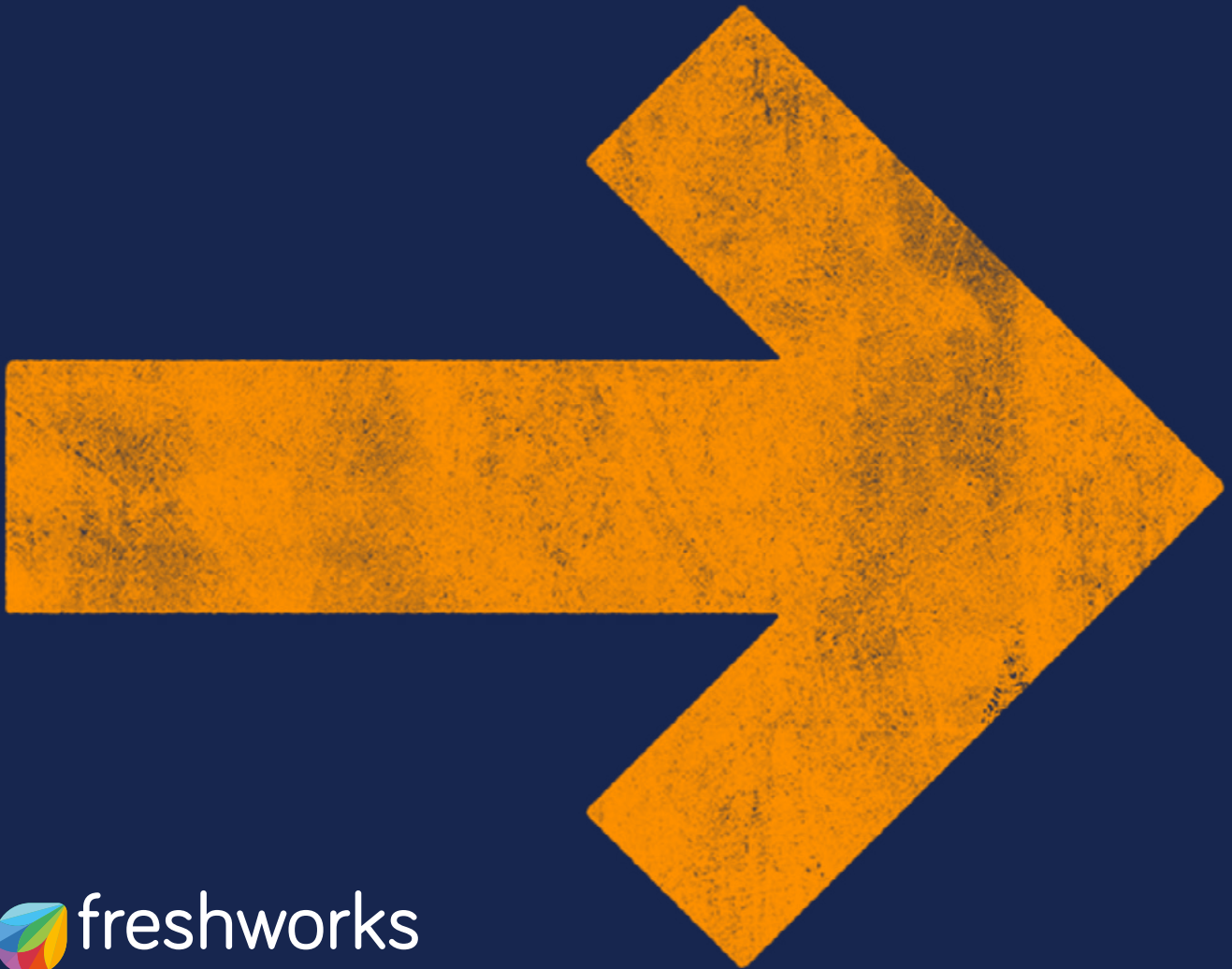
FRESHDESK PLAYED A KEY ROLE IN HELPING PARCELHUB TO CONTINUOUSLY DELIVER ON ITS SLAS.

Despite the 100% increase in agent ticket requests, Parcelhub’s Proactive Tracking Support team managed to quickly adapt to the new working situation to achieve all its clients’ individual service level agreements. Thanks to Freshdesk, the Parcelhub team was able to adapt quickly and prioritise the tickets based on those SLAs. This helped to maintain the company’s own reputation, but also the customer service reputation of the retailers it represents. Freshdesk helped Parcelhub to prioritise, categorise and assign tickets and allowed for collaboration to take place across its platform, giving retailers full visibility of Parcelhub’s responses and enquiry handling.

“Freshdesk played a key role in helping Parcelhub to continuously deliver on its SLAs all while managing the increased demand for its services. The Parcelhub team was able to do this, all while providing that next level customer support that its clients rely on to maintain their own reputations,” concluded Simon Johnson, UK general manager, Freshworks.

If you are interested in hearing more about how to transform your customer experience, please do [get in touch](#).

We have a suite of products ready to help empower your customer support team to work together and resolve customer issues faster.



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DIGITAL TRANSFORMATION IN ENTERPRISE

During lockdown, CIOs went from maintaining corporate infrastructure and responding to people's service tickets in the office to managing entirely remote workforces. Understandably this has been a big leap for many of them, who have worked tirelessly to ensure staff can continue to do their jobs just as well from home. They've had to navigate how to secure corporate devices to run on home networks, how to maintain productivity and morale remotely and how to train and onboard new employees when we can't meet in person.



52%

of firms are planning to cut or defer investment because of COVID-19

Underlying the important role that technology is playing in keeping businesses going during the pandemic, [PwC's recent report](#) highlights that 52% of firms are planning to cut or defer investment because of COVID-19. This drops to only 9% of businesses making those cuts in digital transformation. As with emerging technologies like AI, digital transformation projects can't be undertaken for the sake of it, they have to serve a business purpose and support the entire organisation. [70% of siloed digital](#) transformation initiatives that don't take into account business collaboration, integration or project management fail. The CIO is an integral role to ensuring that digital transformation efforts are for the benefit of the entire company, not just a department.



70%

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Those that have embraced new technologies at this time, using SaaS-based systems, for example, have been in a much better place to deal with the changing environment. With workforces likely to be disparate for some time to come – some in the office, some at home – the need to adjust as the situation continues to evolve is in fact essential to business success.

In the last section we looked outward at customers. Now we are looking inward and how the CIO is central to business success right now.

Innovation overnight: How COVID-19 accelerated digital transformation

These are exceptionally trying times for the CIO of any organisation. The modern CIO is expected to drive digital transformation and business innovation, all while maintaining corporate networks and infrastructure. With the lines between business and IT continuing to blur, CEOs expect to work much more closely with their technology leader, going forward. Those that are equipped to deal with the changing environment – with new technologies, working practices and knowledge bases – will be ultimately those that can best get through this period and continue to operate as normally as possible.



COVID-19 has caused CIOs to reconsider their digital transformation journeys and accelerate with an incredible pace – see the Dune case study in the previous section, for example. Efforts were previously planned over long cycles and rolled out in stages over several years. But now, businesses have been forced to shorten their cycles to a matter of weeks or even days. A recent [report](#) found that COVID-19 has fast-tracked UK businesses' digital transformation efforts by over five years, with 96% noting that the pandemic has sped up their company's plans.

CIOs should be using this time to reprioritise their resources and update their business contingency plans to take into account fluctuating working patterns. For many, working from home is set to continue. This means, from a digital journey perspective, CIOs should be looking into the associated technologies that foster a collaborative and communicative environment. But what areas of digital transformation should CIOs be tackling first?

HIGH PERFORMING SOFTWARE = HAPPY EMPLOYEES

According to the Freshworks-Harvard Business Review Analytic Services Pulse Survey – [Technology's Make or Break Role in Employee Engagement](#), powerful, easy-to-use software contributes to employee satisfaction by enabling a more productive experience. 82% of survey respondents say that employees' happiness on the job is significantly impacted by how well their workplace technology performs. CIOs should ensure the technologies they deploy work best for their employees, and then look to fit the business case around this. Especially when all the trappings of the office are removed and staff feel the focus of work more prominently at home, having user-friendly software is incredibly important for both productivity and overall employee experience.

KEEP COLLABORATING, EVEN OVER VIDEO

Companies need to focus more on collaboration technologies. Whether it's conducting work meetings or catching up with friends and family in the evenings and at weekends, major players such as Microsoft Teams, Zoom, Skype and Google Hangouts are some of the technologies fostering face-to-face interaction and collaboration, albeit through a camera. If it's not face-to-face, consider something like Slack or an internal messaging system that allows businesses to keep employees talking, without being in the same room. These tools are transforming how teams can effectively collaborate from remote environments. Previously, [face-to-face interaction was the preferred mode of communication for meetings](#). But now, businesses have people from all over the world collaborating and working together virtually.

IT SUPPORT NEEDS SUPPORT

IT support teams are under unprecedented pressure, with so much of the expectation of seamless adaptation to working from home falling on their shoulders. Service tickets have significantly increased, and, in many instances, IT teams are stretched to the limit of their resources. It is the responsibility of business leaders, specifically CIOs, to relieve this burden and find ways to ensure employees are more self-sufficient. One way to do this is to move to a more efficient ticketing system that enables IT teams to automatically prioritise and categorise tickets based on historical data. By enabling end-users to reach support via multiple channels such as email, self-service portals, mobile apps, phone and chat services, IT service teams no longer need to be available on email 24/7 to support IT issues.

All roads to a digital future run through IT. With digital transformation efforts increasing rapidly and the traditional barriers having been removed for many businesses, now is the golden opportunity for a much-needed update of many business processes and systems. Businesses have the chance to reinvent themselves to become more agile, responsive, and inclusive. There has never been a better time than right now.



Case study

SAGE elevates its support systems with Freshdesk

SAGE is a leading provider of innovative, high-quality academic content, publishing over 1000 journals and 800 new books each year. To keep up with the competition and continue to deliver the services it has become world famous for, the organisation constantly innovates to provide its clients with new formats of content, such as video packages. And to ensure the smooth running of the business, SAGE needs to meet internal needs as well as properly fulfil both print and digital orders, providing customer-facing support when there are issues.

Historically, the businesses operations team used a shared inbox to manage customer conversations – a situation that Graeme Doswell, Head of Business Solutions and System Operations found “didn’t work, especially when the organisation was continuing to grow, requiring more frequent customer interactions all the time.”

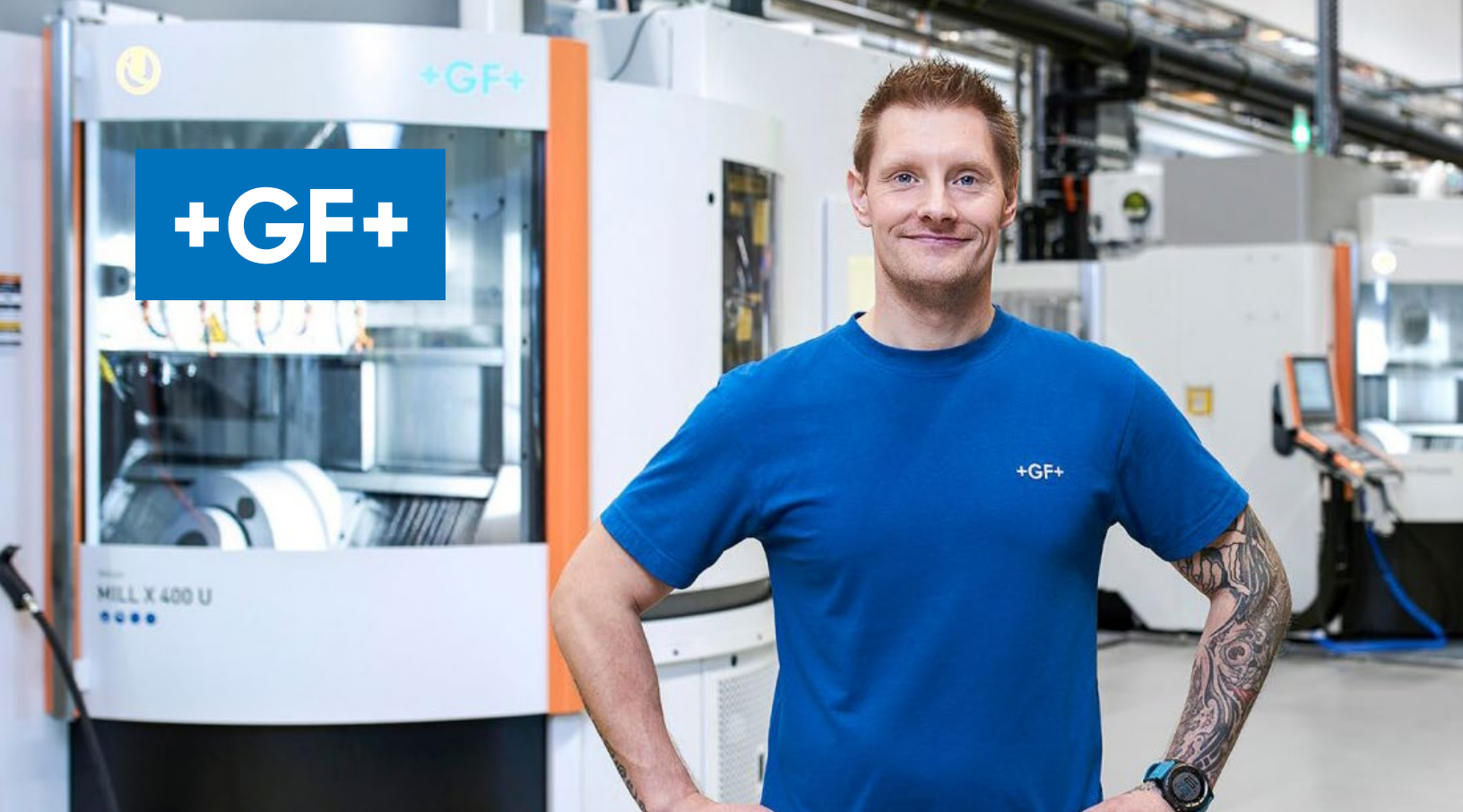
The lack of visibility into assignment, ownership and SLAs on email meant that the team was never on the same page. There was a lot of manual coordination and constant duplication of efforts which, coupled with increasing query volumes, meant the staff were fighting constant backlogs. The lack of organised data meant that there was no easy way to generate reports.

THE SOLUTION WAS ROLLED OUT TO 115 AGENTS LOOKING AFTER THE NEEDS OF SAGE’S 400,000 CUSTOMERS AND READERS.

Thanks to Freshdesk’s easy and effortless setup, SAGE was able to implement the software without any dependencies on centralised IT or dedicated consultants. After an initial pilot phase with six team members, the solution was rolled out to 115 agents looking after the needs of SAGE’s 400,000 customers and readers.

Solving issues within first contact is now at 75% with service level agreement resolution reaching 89%. Freshdesk provides SAGE with data-driven decisions and intelligently automated workflows, allowing for cross-functional collaboration and delivering quality service at scale.

With Freshdesk just the start of its customer service overhaul, SAGE plans to elevate its support systems with a range of offerings from Freshworks – including Freshconnect for inter-function and team collaboration, and Freshcaller, the call centre in the cloud.



Case study

Piping the right answers across a global platform

Manufacturer, Georg Fischer, has grown to a 140-company conglomerate with a presence across 33 countries thanks to its focus on customer-centric innovation. Georg Fischer's subsidiary, Georg Fischer Piping Systems (GFPS) develops, produces, and markets piping systems that are used worldwide to transport water, gases, and aggressive media. Albeit not a household name, GFPS touches the lives of millions across the world, who either directly or indirectly depend on its solutions for their day-to-day needs.

While sales and production offices are GFPS' one point of contact with its customers, they turn to Georg Fischer's Global Service and Support (GSS) team for any technical queries documents, certificates, project pricing, tender, and audits. The complex nature of the queries and the need for lengthy explanations, attachments, and images determined that email was the best form of communication for this purpose – a shared inbox however was not fit for purpose.

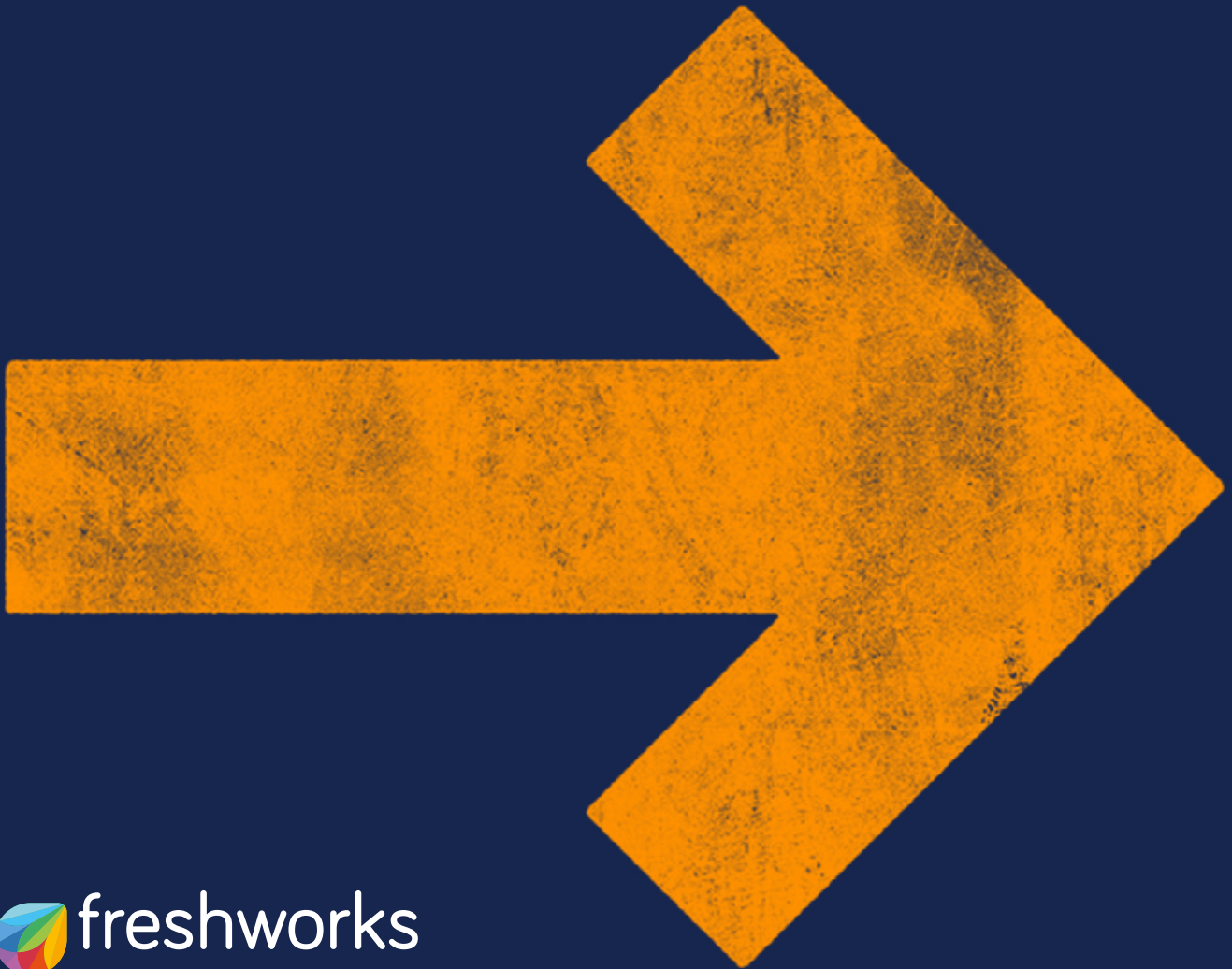
**THANKS TO FRESHDESK, WE REMAIN
TOP-RANKED HERE BECAUSE WE CAN
REALLY PROVE HOW MANY REQUESTS
WE HAVE AND HOW FAST WE ANSWER.**

Deploying Freshdesk meant the GSS team's valuable support service became easier to execute. Sales teams can now route customer queries through Freshdesk, where it is picked up by a member of the GSS team. The team is even able to get in touch with colleagues and subject experts from within the same platform to collaborate and respond rapidly to the more specialist queries. With a 95% adherence to its first response service level agreement, the GSS team can provide answers to customer queries with an average of nine hours.

"We have a quarterly MSQI (Market Support Quality Improvement) survey. Thanks to Freshdesk, we remain top-ranked here because we can really prove how many requests we have and how fast we answer", said Jürgen Harsch, Head of Global Service & Support, GF Piping Systems.

If you are interested in hearing more about how to transform your employee experience, please do [get in touch](#).

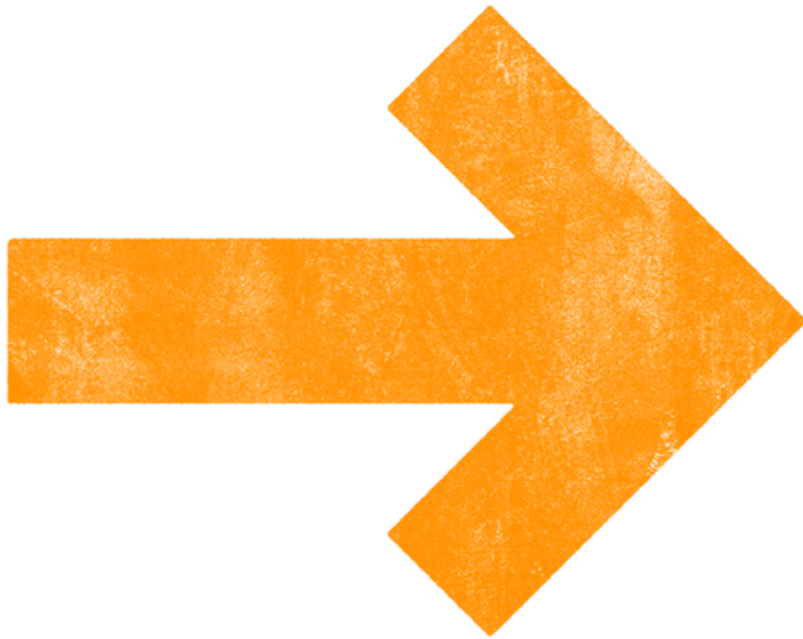
We have a suite of products ready to help streamline your IT services and manage internal requests from your employees.



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RE-ENERGISING YOUR SALES TEAMS





People buy from people; we've heard it a million times before. But what happens when face-to-face interaction and rapport building are removed? Like most of us, sales teams have had to go virtual to conduct their business and support their clients through the pandemic. Shifting to online channels can make it more difficult to establish that personal connection that is essential for buyers – but not impossible. Take video marketing software business, [Wistia](#) for example. The firm has developed email signature videos with their salespeople talking about who they are personally, which provide a quick and engaging way for each customer to see the person they are dealing with.

Understandably, traditional avenues of selling have been restricted in recent months, and many businesses' revenue streams will be smaller as they tighten their purse strings to protect their bottom line through the pandemic.

In this section, we will look at how sales representatives can keep conversations going during and beyond the COVID-19 era. We will also look at how technology can make or break sales executives and how using the right tools is key to getting the most out of teams.

Top tips on selling in the ‘new normal’

Through lockdown, businesses swiftly switched to survival mode, reaching out to customers remotely and tapping into digital channels to sell. While selling has been anything but normal, for many businesses, this time has been the chance to pause, take stock of the situation and refresh their sales approach.

Our recent [sales leader preparedness survey](#) found that 55% of businesses were forced to change their revenue goals in light of the pandemic, with 42% having to change their account plans and 32% changing product discounting policies. This is a massive upheaval but, in this time, nearly half of businesses asked their sales representatives to engage more with their current customers, rather than targeting a new sales pipeline of prospects. Below are a few suggestions from us on how to sell in the months ahead.

1

Understand the changes in your customer mindset:

Our research showed that 62% of respondents were focusing their sales teams on cleaning their CRM system and gleaning valuable insights from it. With a connected CRM system, there is a plethora of data for sales teams to go through and get the best insights they can get. By spending time on this, sales teams can understand more about who their clients and prospects are, and how their priorities may have changed over the past few months.

2

Build stronger relationships:

92% of sales leaders are keeping their sales force engaged and productive by focusing on building deeper relationships with existing customers. Right now, not everybody is going to be in a position to buy. A lot of budgets are in deep freeze while businesses handle the impact of COVID-19. But this doesn't mean salespeople should hold back from those who aren't buying. Instead, they should be taking the time to call up their customers and chat, checking up on how

they are doing. People buy from people so sales representatives should ensure they are engaging with them on a personal level. The CRM system can pull a lot of data on a business' clients and prospects, so executives should take the time to use this information and talk to them. When budgets start to open up and customers need additional support, they'll remember the salesperson that listened to them and didn't try to pressure them to buy all those months ago. Spending time on this, sales teams can understand more about who their clients and prospects are, and how their priorities may have changed over the past few months.

3

Nurture the right customers:

A business' strongest customers today are likely to be its strongest customers tomorrow. It's important to nurture these customers and be there to support them, without necessarily selling to them all the time. Acquiring a new customer costs five times more than retaining an existing one, and the success rate of selling to existing customers is between 60% and 70%. Revenue generation is in the existing bank of contacts, so the focus should be on building these customer relationships.

4

Prepare for the new normal:

With 73% of sales teams and 65% of customers ready to switch to a remote selling scenario, it's important that sales systems are up and running to manage this. Conference systems like Zoom and Microsoft Teams will be incredibly important in the sales cycle as businesses continue to comply with social distancing and lockdown measures. Having adequate conferencing and remote selling capabilities is vital as we navigate the peaks and troughs of the crisis.

Now certainly isn't the time for sales teams to be resting on their laurels. But it isn't the time for aggressive sales tactics either. It's important to strike a balance and show support for customers, while acknowledging the unprecedented situation we all find ourselves in. Building sales technologies out and using the information within the CRM system to develop a comprehensive picture of customers is a good way to spend the time. Remember, existing customers are likely to be those who support a business as much as the business supports them.

Technology as an enabler to motivate teams to sell

It might seem obvious, but happiness is a key component of successful business. And due to the stresses of the pandemic, it is now more important than ever before to focus on maintaining staff wellbeing. When teams are motivated and inspired by their job, they will perform better. And, for those in a sales environment, where financials are directly linked to both their own progress and the growth of a company, having an engaged and driven team is essential. In our [recent survey with Harvard Business Review](#), we found that 81% of respondents who rated their organisation's sales team as very happy reported increases in annual sales over the past two years.

That's a pretty staggering number of people supporting a happy sales team and the related business results. It's also clear from the research that a large portion of that happiness comes from technology and when it's not right, it is affecting the bottom line. 36% of respondents with unhappy sales teams say sales technology is too focused on managing the sales force versus enabling it. Imagine having over a third of your sales team unhappy, simply because of the software that is being used.

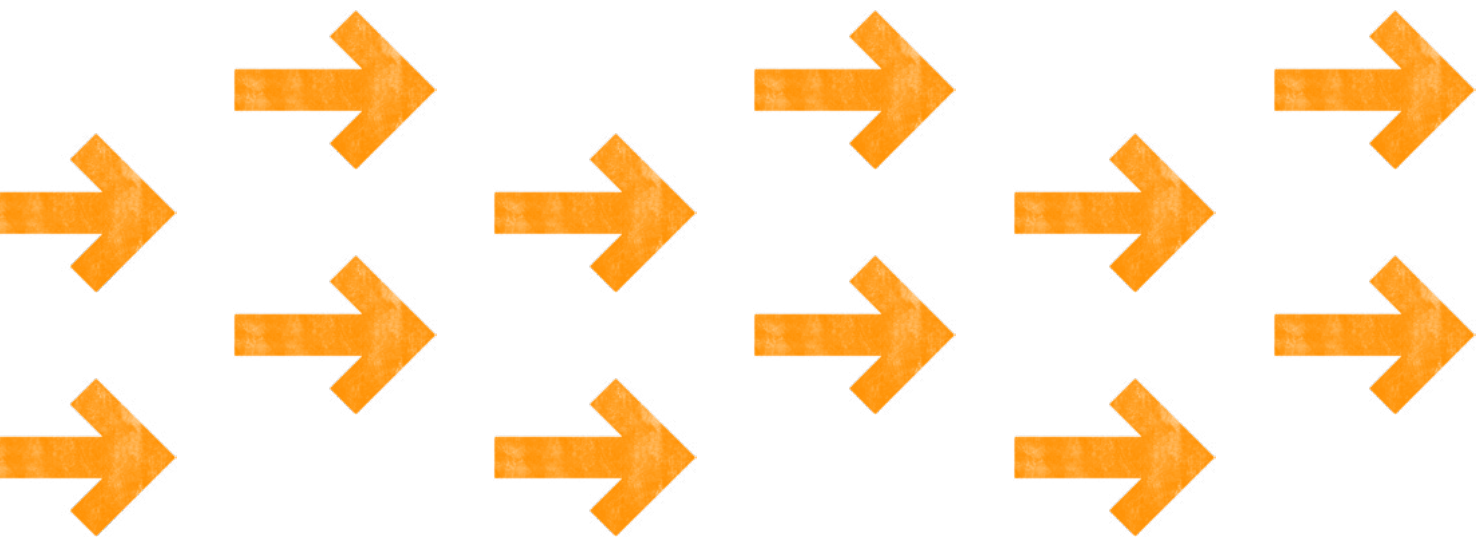
A separate report with [Harvard Business Review](#) found that 77% of employees will look for a new employer if their current job does not provide the tools, technology, or information they need to do their job well. These results paint a pretty stark picture of the role that technology plays within an organisation and how it can impact a sales team's figures.



While happiness can make a real difference to the productivity and success of a sales team, it is often an unquantifiable metric that is difficult to measure. In most cases, the culture of a sales team doesn't actually lend itself towards improving morale, with 66% of executives agreeing that the "typical" sales culture tends to work against salesperson happiness. This can partly be tied back to the type of software that teams are using, especially if it's primarily focused on management being able to access their calls and emails to review progress, rather than team enablement.

With technology paying such a pivotal role in the happiness and success of a sales team, this should be a crucial area of investment, research, and training. [Nine in 10 companies](#) use two or more lead enrichment tools to learn more about prospects. That's just two tools in a whole arsenal of sales and CRM systems used to attract, engage, close and nurture prospects. But why use multiple siloed tools with little interoperability? Armed with a single SaaS-based system that provides a one-stop-shop service for all sales needs, in an easy to use, intuitive and personally customisable dashboard, a business doesn't need to be tied into multiple vendor contracts.

AI and automation can really help sales teams prioritise their tasks. By using automation to input prospect data for example, salespeople get less bogged down in the minutiae of admin and can focus more on selling. This can also help boost their productivity as dull, repetitive tasks are removed from their to-do list. In addition, by integrating live chat functionality into the CRM, any pertinent information gathered from conversations, either with human agents or chatbots, is automatically filtered into the prospect's profile. The CRM then seamlessly integrates inbound lead generation data through a simple web form that automatically generates and sorts each lead by category and priority. This information is presented in a single-pane-of-view style that allows for conversations to be personalised more easily, with the most critical information being presented in the dashboard, such as previous interactions, social media posts and website tracking.



The Harvard Business Review research found that 38% of respondents were likely to be unhappy if they were required to spend too much of their time handling non-selling or administrative tasks, and nearly 35% believed the software their company uses impedes sales success and productivity. Involving salespeople in the initial selection and adoption process of new technology is therefore essential. The tools adopted should support the sales teams and shouldn't be used as a platform by management to make checks on performance. If businesses are looking to be successful in sales, retain top talent and keep their workforce engaged, it all starts with the technology they deploy.



Case study

Shelton Development Services builds on its successes thanks to Freshsales

UK-based Shelton Development Services (SDS) designs and sells housing development services for customers in the residential housing sector. 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. Following a two-pronged approach to business, SDS provides support to its existing customers while also selling its software to them. It's this approach that led SDS to deploy Freshsales.

Using Freshsales from Freshworks, sales representatives are now able to identify, prioritise, and effectively communicate with contacts, without having to trawl through disparate data silos or various spreadsheets. The sales team can immediately see who's reading the email marketing, typical open rates, click rates, bounce rates and so on. It also gives improved visibility into how each campaign is performing and how best to communicate with prospects and customers.

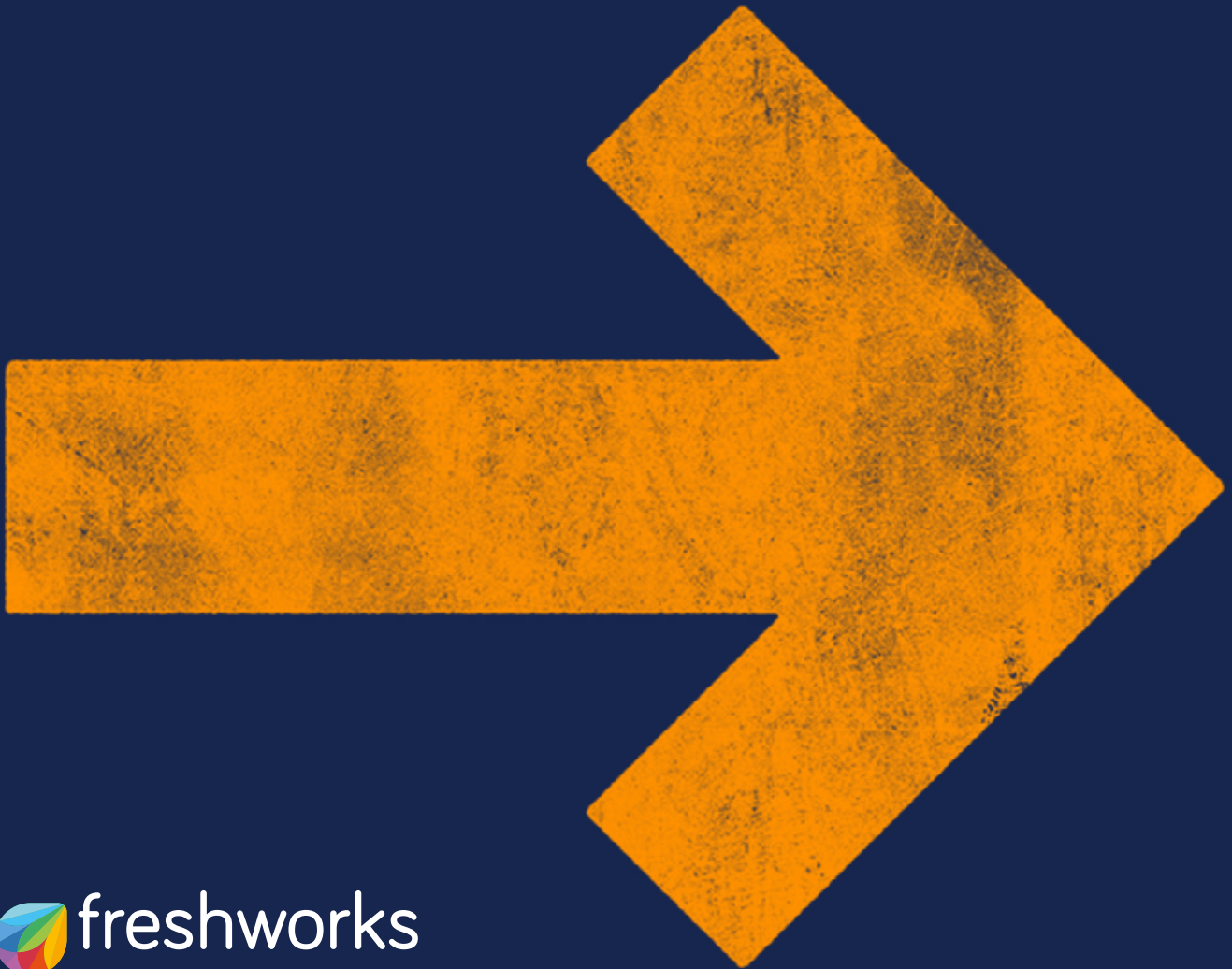
OVERALL, WITH FRESHSALES, WE NOW HAVE A REPOSITORY OF ALL OUR CUSTOMERS AND PROSPECTS. WE CAN ACCESS DATA ON EVERY SINGLE PERSON WHO HAS DONE BUSINESS WITH US IN THE PAST AND GENERATE REPORTS ON OUR OVERALL BUSINESS PERFORMANCE.

“Within a week, we were able to migrate data from our previous system to Freshsales and get up and running with the CRM. The software is really easy to use”, said Phil Shelton, Chief Executive Officer, Shelton Development Services. “Overall, with Freshsales, we now have a repository of all our customers and prospects. We can access data on every single person who has done business with us in the past and generate reports on our overall business performance.”

Thanks to Freshsales, SDS increased its sales visibility by over 100% and saw revenue increase eight-fold. The business was also able to save 33% of its total outgoings on the cost of external tools.

If you are interested in hearing more about how to boost your sales, please do [get in touch.](#)

We have a suite of products ready to help your sales team close deals faster.



1. THE NEW CUSTOMER EXPERIENCE
2. DIGITAL TRANSFORMATION IN ENTERPRISE
3. RE-ENERGISING YOUR SALES TEAMS
4. HOW FRESHWORKS CAN HELP

HOW FRESHWORKS CAN HELP



We understand that this year has been like no other for businesses. But we've also seen countless examples of businesses that have embraced the digital economy who have been able to recover quickly. Taking smart decisions, making changes and being mindful of what both their customers and employees need has been at the cornerstone of these businesses' resilience.

Here at Freshworks, we believe your business deserves better software – software that's powerful, ready to go and works right out of the box. But all too often, we have seen organisations get it wrong, for themselves, their customers, and their employees. As shown by the examples we have shared here, technology is truly the driver behind business growth and businesses ignore this at their own risk.

For us, we are in the business of keeping customers for life – whether those customers are an organisation's employees, or those it sells to. Our extensive product suite is designed just for this purpose and has suited over 40,000 customers around the world.

Provided below is some information on our core product portfolio:



Empower your customer support team to work together and resolve customer issues faster. Freshworks was the only “visionary” on the 2020 Gartner Magic Quadrant for the CRM Customer Engagement Center. With Freshdesk, you can unify and manage all support-related communications from multiple channels on a single platform. Whether that's converting support emails into trackable tickets, setting up a fully functioning customer support centre, engaging, supporting, and retaining customers through live chat, or even engaging with your customers instantly through WhatsApp – Freshdesk has it all.



Streamline your IT service and manage internal requests from your employees. Businesses can increase process efficiency and service agility through AI and automation. Thanks to the simplified service environment, key information and workflows are readily available so your agents can quickly access what they need. With machine learning in place, suggestions and responses to incoming tickets are provided, giving your agents time to focus on more strategic IT initiatives.



Keep your sales team in the know about prospects and help them close deals faster. A fully customisable dashboard allows you to reflect your business terminology, create and edit fields across modules and have a system that works for you. With our automation system, your sales teams can dispense with the mundane manual work by automating your sales process to make sure your time is spent in the best way. From visual sales pipeline, to customisable reports to mobile applications and communication and collaboration features, Freshworks CRM (formerly Freshsales) has it all in one place.

We put this report together to take a look at how businesses have embraced the digital economy and adapted rapidly to get back up and running after many months of uncertainty. There are still a lot of unknowns right now, but we firmly believe that software doesn't need to be one of them. Our product suite is designed to have your business at its heart, and we believe it does just that. We think you can make a fresh start with Freshworks and when you're ready, we'd love to talk to you about how to do just this.

To find out more, please contact us at eu-sales@freshworks.com where one of our team will be happy to help. We are available 24/5.



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