



# Internal Sales Engagement CRM — Case Study

Replacing scattered notes + disconnected email threads with a purpose-built sales operating system

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## Company Overview

The customer is a sales-driven team that needed a simple, consistent way to run outreach and relationship-building day to day. As lead volume grew, the existing process (inbox + spreadsheets + tribal knowledge) created gaps: leads fell through the cracks, follow-ups were inconsistent, and performance was hard to measure.

## At a glance

- Relationship-based sales motion with both “direct leads” and “connector-driven introductions”
- High outbound email volume and repeated messaging patterns
- Need for fast daily execution (touch many records quickly)
- Need for measurable, repeatable sales process (pipeline timing + activity KPIs)

## The Challenge

Leads and connector relationships weren’t being managed consistently—not because the team didn’t care, but because the workflow was fragmented and manual.

What was happening:

- Leads were not being captured reliably and were “getting lost” through the process
- Connectors weren’t managed as a first-class workflow, so introductions were inconsistent
- Every email required “handwriting from scratch” wasting time and reducing consistency
- No standardized scripts/toolkits → “sales training took too long” and quality varied by rep
- Emails lived in Outlook, CRM data lived elsewhere → no unified view of the relationship
- Couldn’t see “stage timing” (how long leads sat in each step) or overall sales metrics
- Most importantly: the team couldn’t “move through all leads daily” in a focused way to ensure consistent touchpoints

## Goals & Requirements

1. Centralize the day-to-day sales workflow into one tool the team actually uses
2. Support **Leads, Prospects, and Connectors** with consistent, repeatable workflows
3. Standardize outreach using “toolkits + scripts” to improve quality and onboarding speed

4. Sync and act on real email threads inside the system (read, reply, schedule)
5. Enable high-throughput daily execution with “Queue Mode”
6. Measure key KPIs (email activity + stage timing) to manage performance, not guesses

## The Solution

We built a custom internal CRM designed around the team’s actual sales motion: track the right records, work them quickly every day, and keep email + pipeline activity in one place.

What changed immediately:

- A single workflow for “capturing records, progressing stages, and tracking activity”
- Repeatable scripts/toolkits embedded where the work happens
- Email threads synced into each record with in-app replies and scheduled sending
- Queue-style daily processing so nothing gets missed
- Built-in visibility into activity and pipeline timing metrics

## System Features & Functionality

### Unified Sales Records (Leads, Prospects, Connectors)

- Dedicated areas for “Leads”, “Prospects” and “Connectors”
- Record details, assignment/visibility, attachments, and activity history in one place
- Status pipelines tailored by record type (stage progression built into the workflow)

The screenshot shows a CRM interface for 'Leads'. At the top, there are navigation tabs: TOOLKITS, OUTBOUND, PROSPECTS, CONNECTORS, LEADS, and a user profile icon (DS). Below the tabs, there are buttons for 'FETCH EMAILS', 'QUEUE MODE', and 'NEW LEAD'. A search bar and two toggle switches ('Open only' and 'Include not qualified') are visible. The main content is a table with 21 leads. The table columns are: Name, Company, Assigned, Email, How Heard, Status, New email, Open todos, Updated, and Closed. Each row includes a profile picture, a lead name, company name, assigned user email, lead email, source, status (e.g., 'ScheduleProjectPlanning', 'CompleteProjectPlanning', 'CloseDeal'), a 'New' indicator, an 'Open' indicator, the last update time, and a 'Closed' indicator.

Name	Company	Assigned	Email	How Heard	Status	New email	Open todos	Updated	Closed
Devon Seacrest (Test)	Acme Co	drseacrest@gmail.com	drseacrest@gmail.com	-	ScheduleProjectPlanning	-	-	3/13/2026, 10:07:41 PM	-
Dave Park	Mobalign Franshising Inc.	-	dave@mobalign.com	WinDifferent	CompleteProjectPlanning	New	-	3/13/2026, 10:04:33 PM	-
Nelson Granja	Axialent	joshuab@codebuddy.com	nelson.granja@axialent.com	WinDifferent	ScheduleProjectPlanning	-	Open	3/13/2026, 10:04:25 PM	-
Katy Tezak	RingCraft	-	katy@drinktliga.com	NMotion	CloseDeal	-	Open	3/13/2026, 10:04:24 PM	-
Dylan Davy	The Social Inc	-	Dylan@thesocialinc.co.uk	WinDifferent	ScheduleSalesMeeting	-	-	3/13/2026, 10:04:20 PM	-
Ben Bullen	ReSpace	-	ben@respace.co.uk	WinDifferent	CompleteQuote	New	Open	3/13/2026, 10:04:01 PM	-
Chaeli Greco	Greco PT & Airmcare	-	chaeli@greco-pt.com	MoveVC (Alyssa)	ScheduleSalesMeeting	New	-	3/13/2026, 10:03:48 PM	-
Jimmie Dang	Seafresh Trading	-	jdang@seafreshtrading.com	WinDifferent	ScheduleSalesMeeting	-	-	3/13/2026, 10:03:43 PM	-
Nick Lucatino	Inclusive Pathways Project	-	nick@inclusivepathwaysproject.com	WinDifferent	ScheduleSalesMeeting	New	-	3/13/2026, 10:02:42 PM	-
Ricardo Garcia	LegalChile	-	ricardo.garcia@legalchile.cl	WinDifferent	ScheduleProjectPlanning	-	Open	3/13/2026, 10:02:39 PM	-
Rolando Cardenas	Walook	joshuab@codebuddy.com	rcardenas@walook.com.mx	WinDifferent	ExpressedInterest	New	-	3/13/2026, 10:02:37 PM	-
Devon 10	10	-	drseacrest10@gmail.com	-	ExpressedInterest	-	-	3/13/2026, 10:02:36 PM	-
John Carroll	Godolphin & Latymer (School)	-	jcarroll@godolphinandlatymer.com	WinDifferent	CloseDeal	New	-	3/13/2026, 10:02:34 PM	-
Lauren Munderloh	Abroadify	-	lauren_munderloh@ku.edu	Referral - Dane C.	ScheduleSalesMeeting	New	-	3/13/2026, 10:02:26 PM	-
Federico Aresti	Crowne Plaza London Docklands	-	federico.aresti@cpdocklands.co.uk	WinDifferent	ScheduleSalesMeeting	New	-	3/13/2026, 10:02:23 PM	-

# Conversation Log + Stage Progression

- Each record has an Activity/Conversation view with:
- Clear “close” outcomes when a record is done (so pipelines stay clean)

The screenshot shows a CRM interface for a lead named Nelson Granja. At the top, there are navigation tabs: DETAILS, ACTIVITY (selected), ATTACHMENTS, and SCHEDULED EMAILS. On the right, there are status buttons: DECLINED (LOST), NOT QUALIFIED, and WON. The main area displays a list of activities:

- 1/19/2026 • Outbound • Accepted: 30 Min Meeting between Nelson Granja and Joshua Berrios
- 1/20/2026 • Expressed interest (Completed: 1/20/2026) [checked]
- 1/20/2026 • Schedule Meeting (Completed: 1/22/2026) [checked]
- 1/22/2026 • Complete Meeting (Completed: 1/22/2026) [checked]
- 1/22/2026 • Schedule Project Planning (ScheduleProjectPlanning) [unchecked]
- 1/22/2026 • Sales Script
- 1/22/2026 • Guion de Ventas
- 1/22/2026 • Follow up a week from 1/22/26

At the bottom, there are buttons to '+ ADD TODO' and '+ ADD SCRIPT FROM TEMPLATE'.

# Toolkits & Script Templates (Faster onboarding + consistent outreach)

- Assign a script to a specific record as a **\*\*snapshot\*\*** so reps can customize without breaking the source
- Scripts live directly in the record workflow for real-time use during outreach and meetings

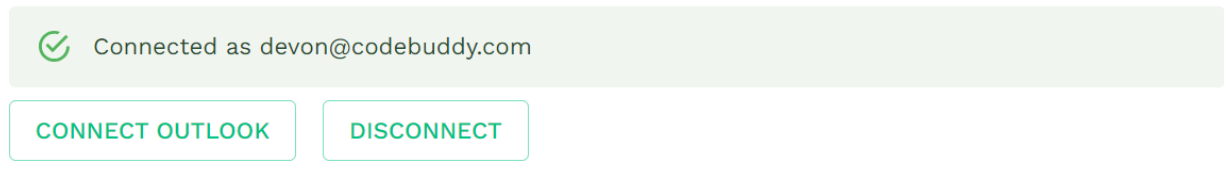
The screenshot shows a CRM interface for a Pipeline Toolkit. At the top, there are navigation tabs: TOOLKITS (selected), OUTBOUND, PROSPECTS, CONNECTORS, LEADS, and DS. A 'NEW TEMPLATE' button is visible in the top right. The main area is divided into two sections:

- Any Stage**: A list of toolkits with their last updated dates and icons for edit, share, and delete.
  - CodeBuddy Language Support (Last updated: 1/20/2026, 11:25:20 AM)
  - Custom Conversation (Last updated: 12/30/2025, 10:18:07 PM)
  - Custom Email Conversation (Last updated: 1/21/2026, 9:42:20 AM)
  - Lead Checklist (Last updated: 1/20/2026, 10:57:00 AM)
  - Phone Conversation (Last updated: 1/20/2026, 10:59:52 AM)
  - Recording transcript (Last updated: 1/20/2026, 11:00:20 AM)
  - Research Notes (Last updated: 1/20/2026, 4:06:59 PM)
  - Testimonial Letters (Last updated: 1/21/2026, 10:06:16 AM)
- Schedule Sales Meeting**: A list of meeting templates with their last updated dates and icons for edit, share, and delete.
  - Schedule a Sales Call (#1) - Schedule Meeting (Last updated: 1/24/2026, 10:26:50 PM)
  - Schedule a Sales Call (#2) - Checking back (Last updated: 1/25/2026, 12:22:51 AM)
  - Schedule a Sales Call Breakup (#4) - Should I close the loop? (Last updated: 1/21/2026, 10:10:09 AM)

# Outlook Email Sync + In-App Replies (and scheduled sends)

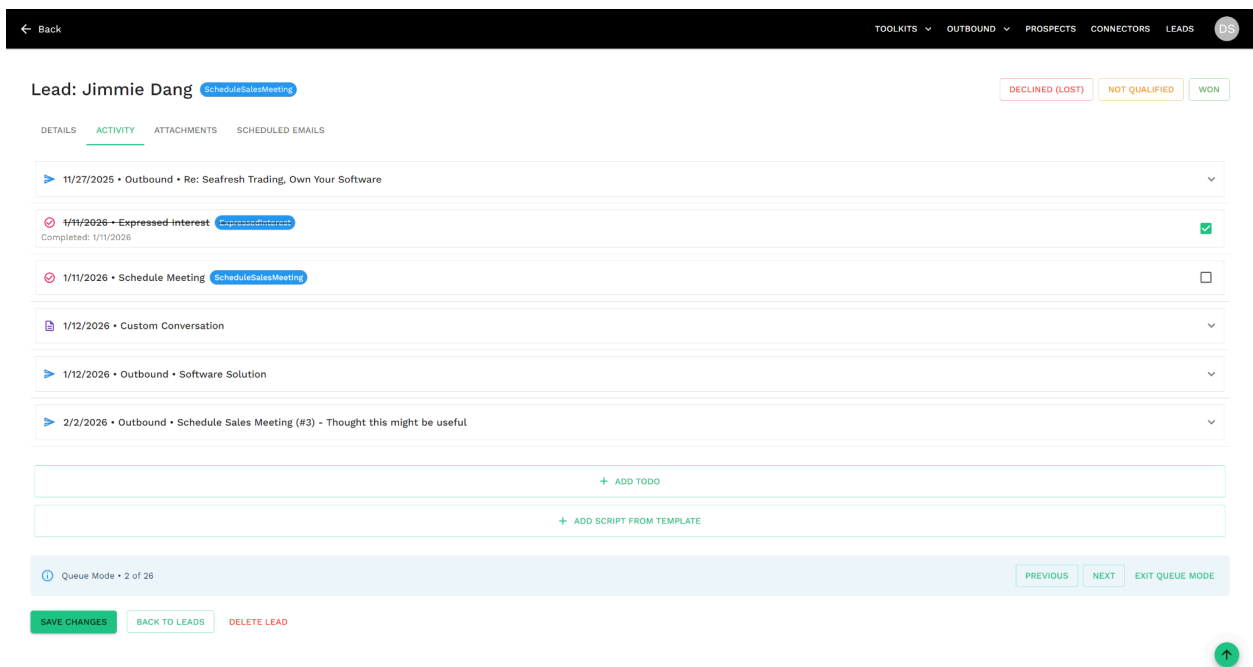
- Connect Outlook mailbox
- Fetch inbound/outbound emails into each record's activity feed
- Reply (and schedule replies) inside the tool so the thread stays intact
- Option to schedule script emails and replies for later sending (supports consistent follow-up timing)

## Outlook mailbox



## Queue Mode (Daily execution)

- A focused, one-by-one flow to process assigned records quickly
- Next/Previous navigation across the queue
- Resumeable sessions so daily work is frictionless and consistent



## Metrics & Visibility

- Lead analytics that show:
  - inbound/outbound email counts
  - time spent between pipeline stages

- total cycle time for closed/won items

## Optional: Outbound Campaign Runs (SendGrid scheduling + suppression)

- Define an outbound campaign run (volume by day + send window + template)
- Auto-generate a send plan for eligible prospects
- Suppression rules prevent sending to bounced/unsubscribed/responded recipients

The screenshot shows a web application interface for configuring a Campaign Run. At the top, there is a navigation bar with a 'Back' button and several menu items: TOOLKITS, OUTBOUND, PROSPECTS, CONNECTORS, LEADS, and a user profile icon labeled 'DS'. The main content area is titled 'Campaign Run' and includes two buttons: 'BACK TO LIST' and 'SAVE & CLOSE'. Below the title, there is a form with several fields: 'Prospect mailbox' (a dropdown menu), a warning message stating 'The mailbox for this Campaign Run is disconnected. Select a connected mailbox to continue.', 'Campaign Name' (text input with 'Real Estate'), 'From Address' (text input with 'devon@getcodebuddy.com'), 'Link Brand' (text input with 'click.getcodebuddy.com'), and 'SendGrid Template Id' (text input with 'd-e40cafdaa2ac40b8bee250957d3d6f09'). There are also two time pickers for 'Email Start Hour' (01:30 AM) and 'Email End Hour' (01:35 AM), and a 'Retry...' counter set to 0. At the bottom, there is a 'Daily schedule' section with a table for configuring the schedule over five days.

Day	Date	Volume
Day 1	02/15/2026	3
Day 2	02/16/2026	2
Day 3	mm/dd/yyyy	Volume
Day 4	mm/dd/yyyy	Volume
Day 5	mm/dd/yyyy	Volume

## Results & Impact

### Improve conversion and follow-through

- Conversion rates increased from “40% → 80%”
- Fewer leads lost due to a consistent daily processing workflow

### Save time and increase throughput

- Time to touch the same number of customers decreased by “75%”
- Less manual writing and context switching (scripts + in-record email handling)

### Improve customer experience

- Customer service scores “doubled” due to faster, more consistent communication and follow-up

# Before vs After

Area	Before (Inbox + Ad Hoc Notes)	After (Custom Sales Engagement CRM)
Lead Capture	Inconsistent, leads got lost	Centralized records with assignment + visibility
Connector Workflow	Not structured, intros inconsistent	Connectors managed as first-class records with their own workflow
Outreach Quality	Handwritten emails, inconsistent	Script templates + toolkits embedded in workflow
Daily Execution	Hard to work everything daily	Queue Mode for fast, consistent daily touchpoints
Email + CRM Data	Disconnected	Outlook sync + in-app replies + scheduled sends
Metrics	Limited visibility	Stage timing + activity metrics per lead

## Quote

“Going from scattered follow-ups to a single daily workflow completely changed our execution. We touch more people, with better messages, in a fraction of the time—and we can finally see what’s working.”

## Key Takeaways

- Purpose-built internal tools outperform generic CRMs when the goal is “speed, consistency, and adoption”
- Embedding scripts and email workflows directly into the record view reduces training time and improves quality
- Queue-based daily processing prevents leads from getting lost and makes follow-up a habit
- Measuring stage timing and activity turns sales execution into something you can manage and improve systematically

## Contact Us

If you’re running finances across spreadsheets and generic tools—and it’s slowing down decisions—we can help you design a lean finance workflow that fits your business.

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