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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

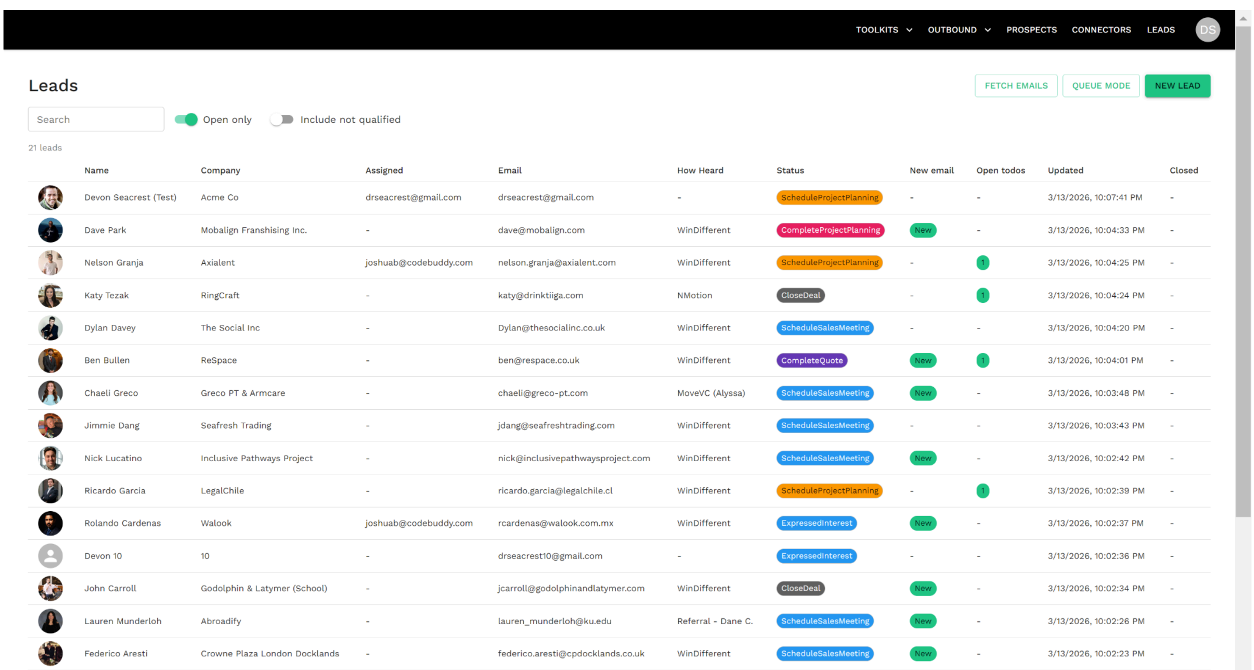
We built a custom internal CRM designed around the team’s actual sales motion: track the right records, work them quickly every day, and keep email + pipeline activity in one place.

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

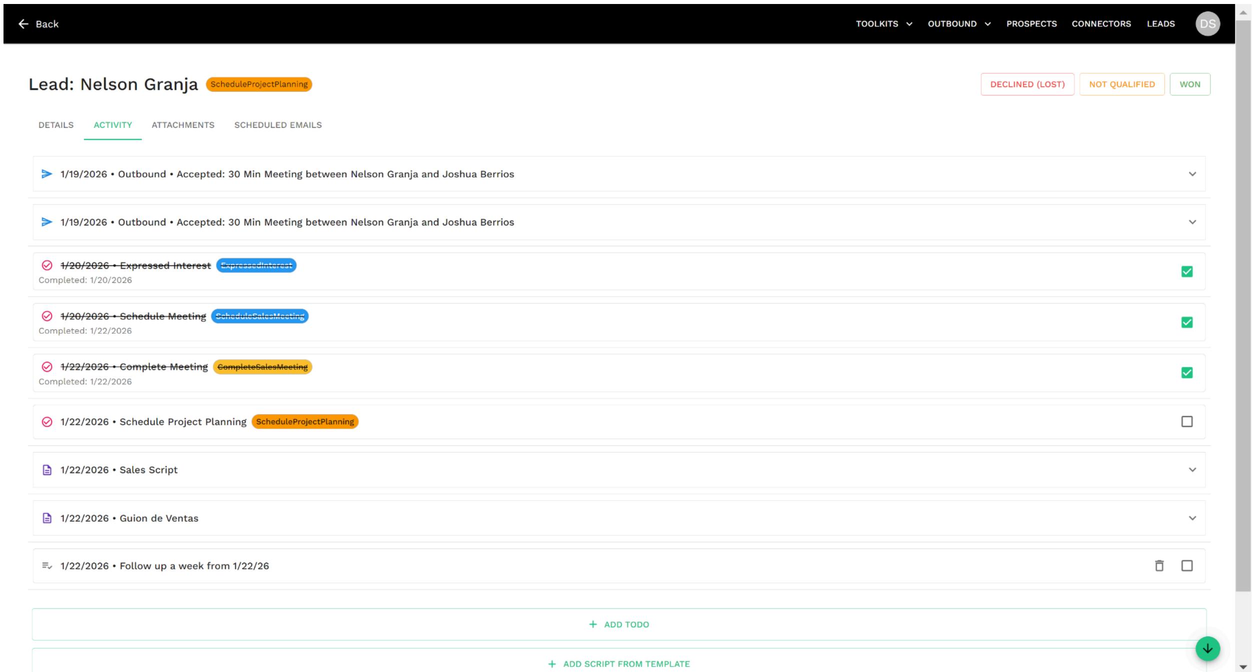
Unified Sales Records (Leads, Prospects, Connectors)

- 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)



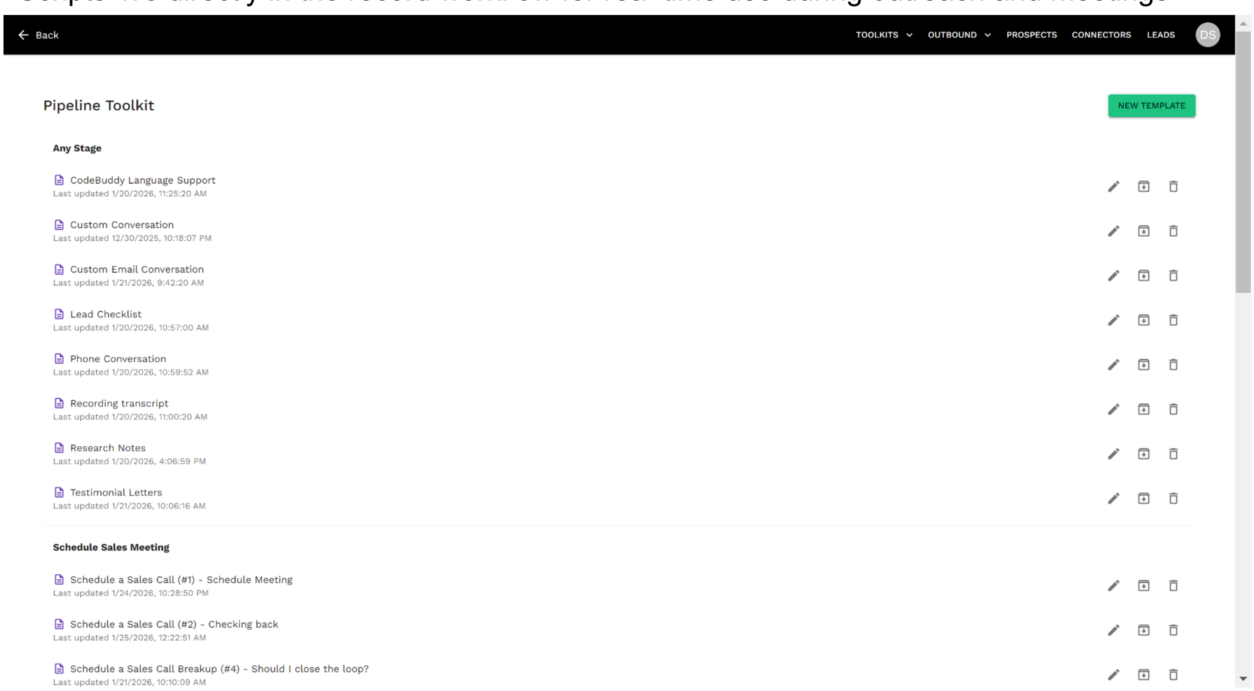
Conversation Log + Stage Progression

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



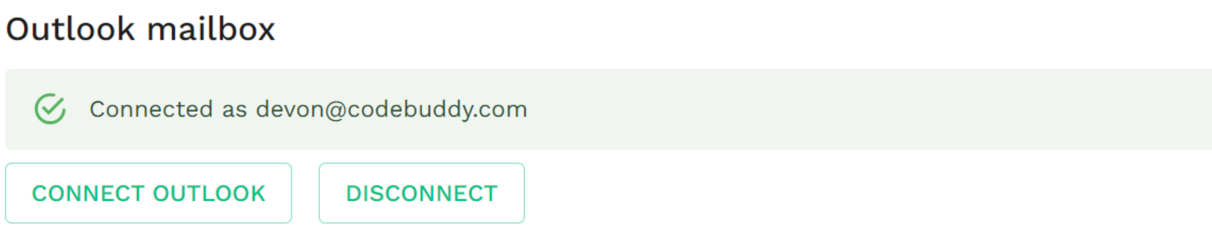
Toolkits & Script Templates (Faster onboarding + consistent outreach)

- 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



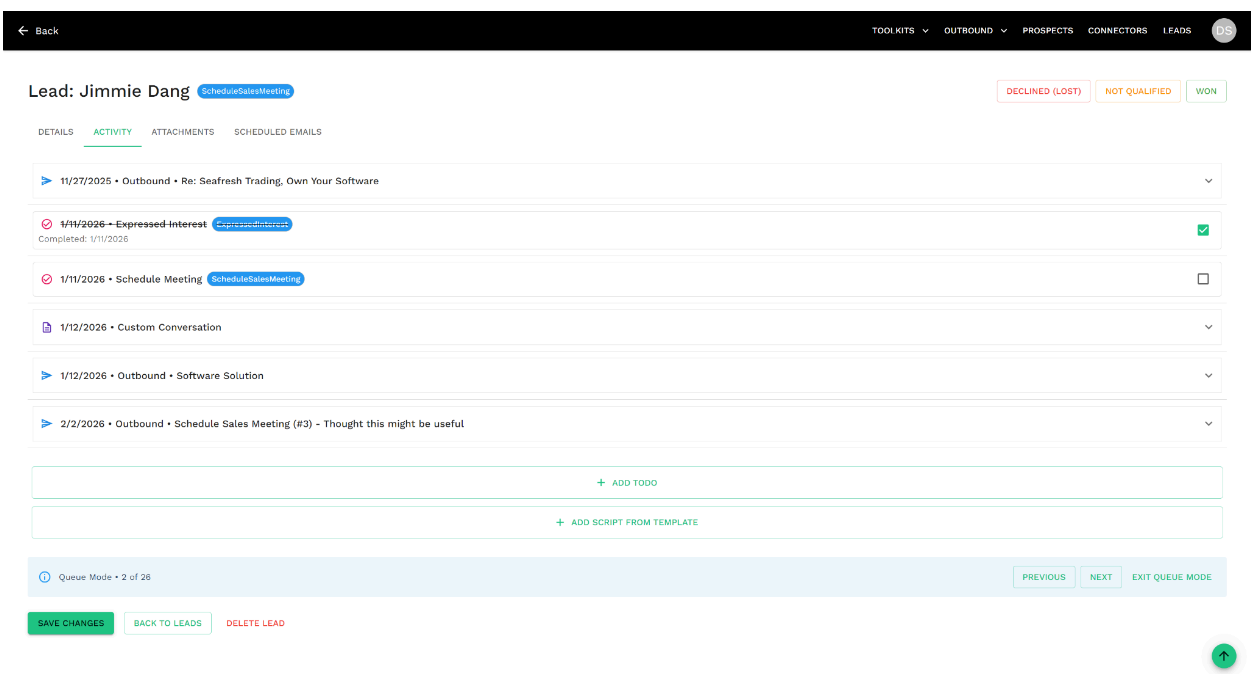
Outlook Email Sync + In-App Replies (and scheduled sends)

- 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)



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



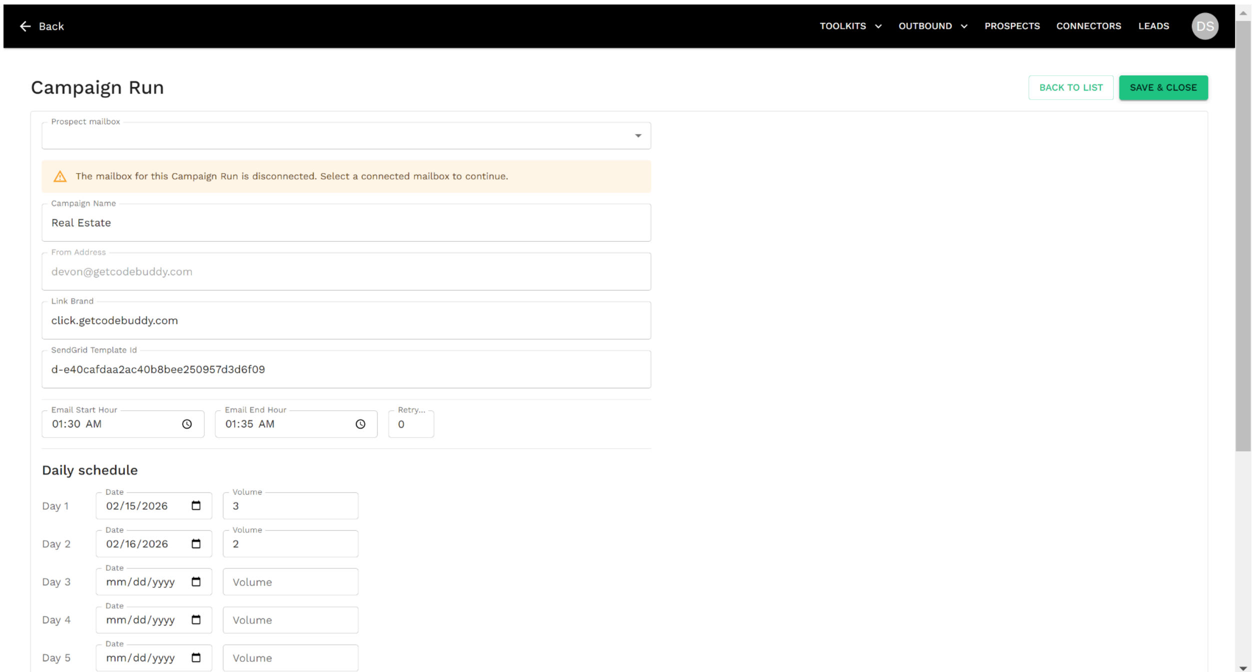
Metrics & Visibility

- 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



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

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