

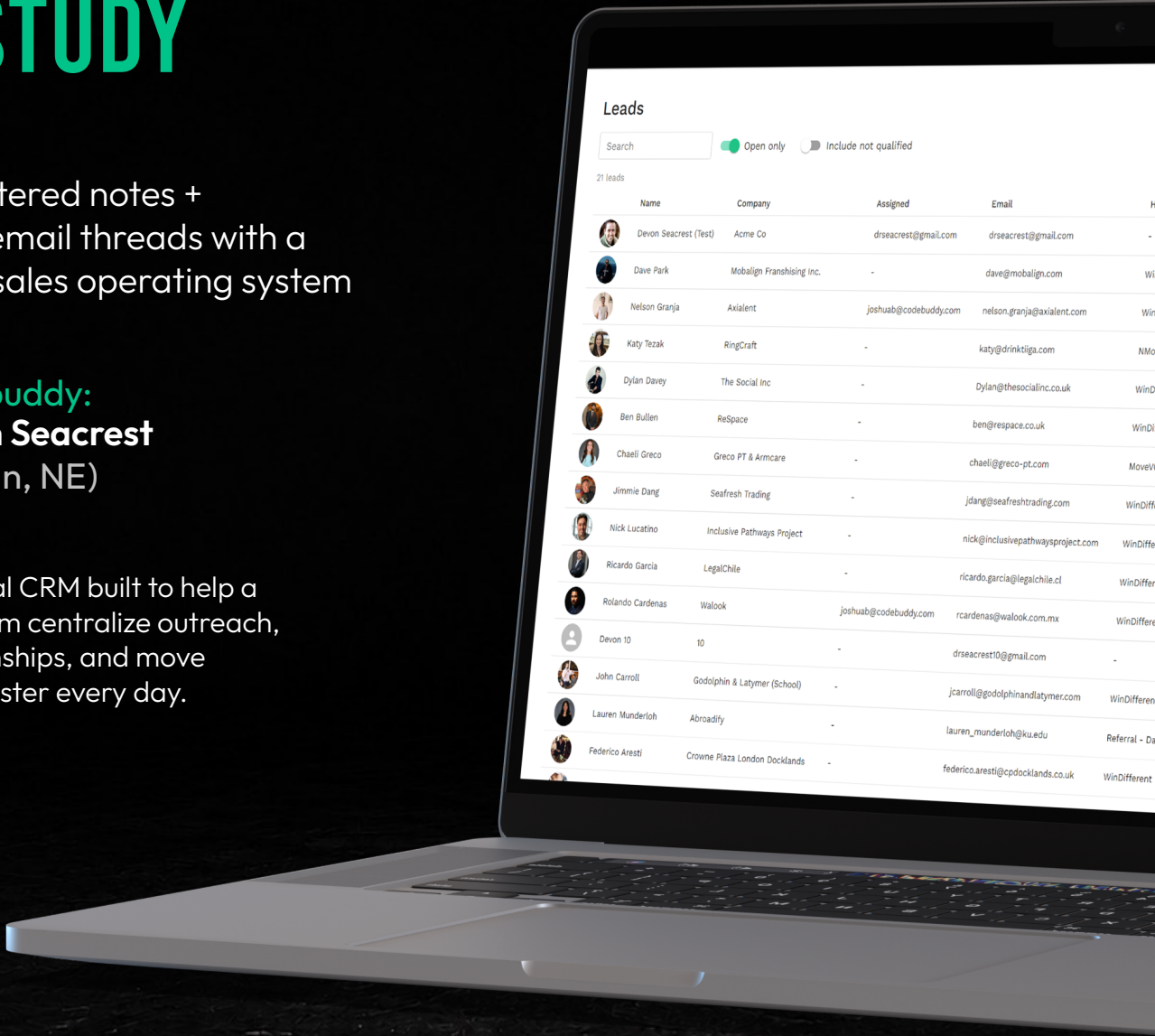
INTERNAL SALES ENGAGEMENT CRM — CASE STUDY

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



Codebuddy:
Devon Seacrest
(Lincoln, NE)

A custom internal CRM built to help a sales-driven team centralize outreach, manage relationships, and move through leads faster every day.



40% - 80%
CONVERSION IMPROVED

Conversion rates increased from 40% to 80%.



75% FASTER
CUSTOMER TOUCH

Time to touch the same number of customers decreased by 75%.



2X
CUSTOMER SERVICE SCORES

Customer service scores doubled through faster and more consistent follow-up.

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

01

CENTRALIZE THE DAY-TO-DAY

Centralize the day-to-day sales workflow into one tool the team actually uses

02

SUPPORT KEY RECORDS

Support ****Leads, Prospects, and Connectors**** with consistent, repeatable workflows

03

SUPPORT KEY RECORDS

Standardize outreach using “toolkits + scripts” to improve quality and onboarding speed

04

SYNC EMAIL THREADS

Sync and act on real email threads inside the system (read, reply, schedule)

05

ENABLE QUEUE MODE

Enable high-throughput daily execution with “Queue Mode”

06

MEASURE KPIS

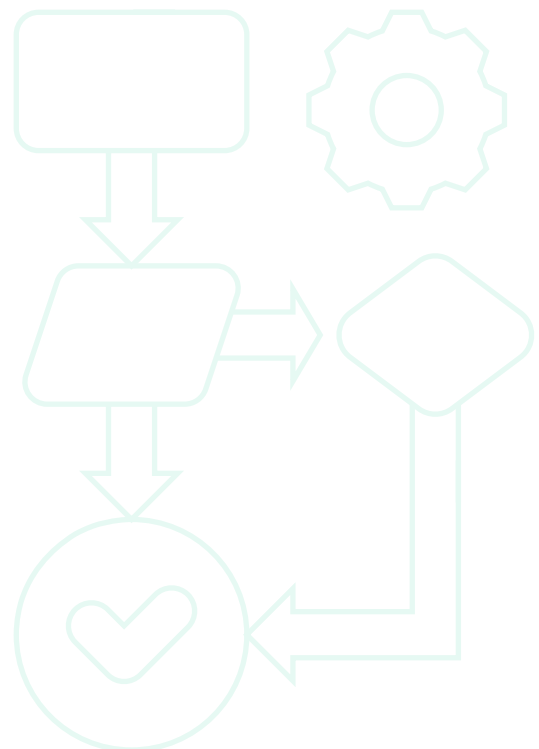
Measure key KPIs (email activity + stage timing) to manage performance, not guesses

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)

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	Mobaligh Franchising Inc.	-	dave@mobaligh.com	WinDifferent	CompleteProjectPlanning	New	-	3/13/2026, 10:04:33 PM	-
Nelson Granja	Axialent	joshuab@codebuddy.com	nelson.granja@axialent.com	WinDifferent	ScheduleProjectPlanning	-	1	3/13/2026, 10:04:25 PM	-
Katy Tezak	RingCraft	-	katy@drinktiga.com	NMotion	CloseDeal	-	1	3/13/2026, 10:04:24 PM	-
Dylan Davey	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	1	3/13/2026, 10:04:01 PM	-
Chaeli Greco	Greco PT & Armicare	-	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	-	1	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)

Lead: Nelson Granja ScheduleProjectPlanning DECLINED (LOST) NOT QUALIFIED WON

DETAILS ACTIVITY ATTACHMENTS SCHEDULED EMAILS

- 1/19/2026 • Outbound • Accepted: 30 Min Meeting between Nelson Granja and Joshua Berrios
- 1/19/2026 • Outbound • Accepted: 30 Min Meeting between Nelson Granja and Joshua Berrios
- 1/20/2026 • Expressed Interest ExpressedInterest
- 1/20/2026 • Schedule Meeting ScheduleProjectPlanning
- 1/22/2026 • Complete Meeting CompleteSalesMeeting
- 1/22/2026 • Schedule Project Planning ScheduleProjectPlanning
- 1/22/2026 • Sales Script
- 1/22/2026 • Guión de Ventas
- Ev. 1/22/2026 • Follow up a week from 1/22/26

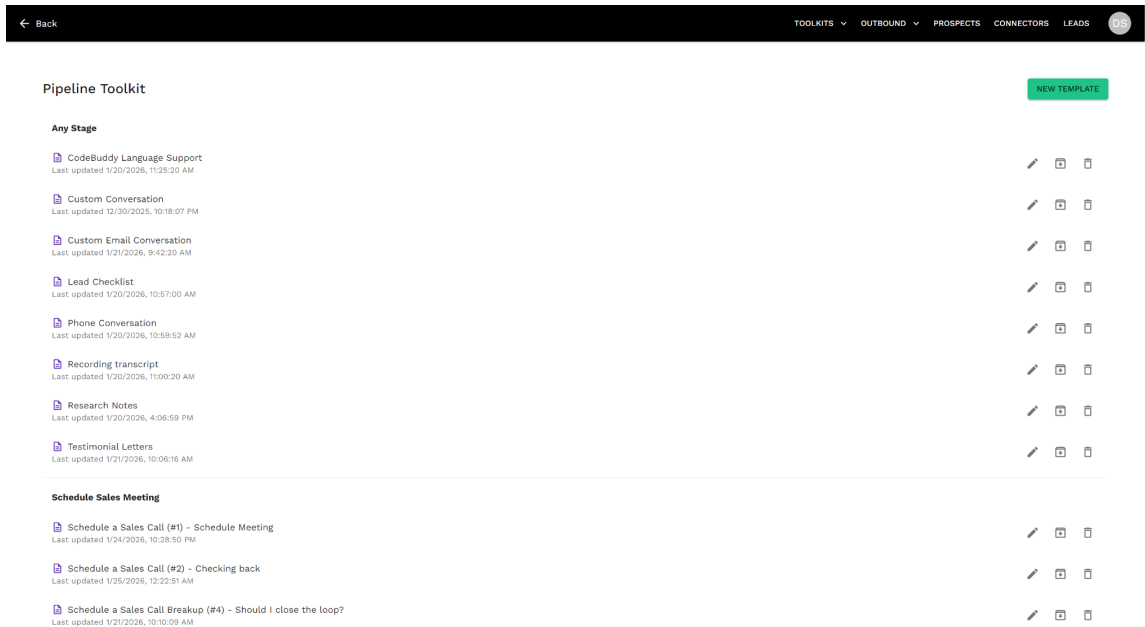
+ ADD TODO

+ 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



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

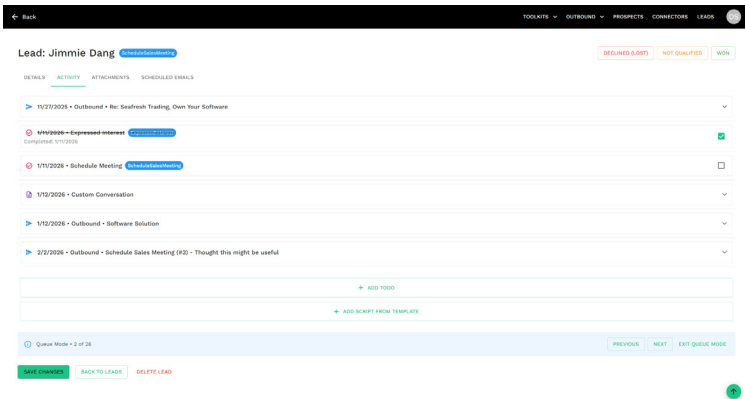
✓ Connected as devon@codebuddy.com

CONNECT OUTLOOK

DISCONNECT

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

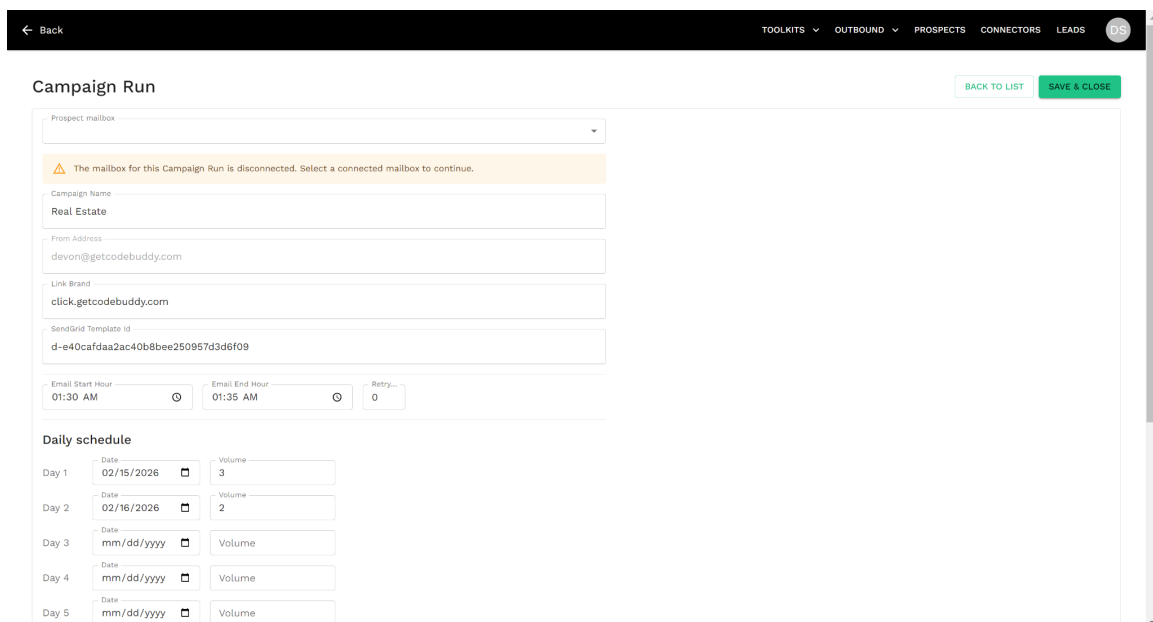


Metrics & Visibility

- 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 send
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

01

Purpose-built internal tools outperform generic CRMs when the goal is “speed, consistency, and adoption”

02

Embedding scripts and email workflows directly into the record view reduces training time and improves quality

03

Queue-based daily processing prevents leads from getting lost and makes follow-up a habit

04

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.



Devon Seacrest



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