

CRM for small business: Why Planned Marketing switched from Insightly to Freshsales

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With Freshsales, my team is achieving more sales outreach now than in the history of the company.

Allison Sanka
Director of Marketing Operations



Based in Plymouth Meeting, Pennsylvania, Planned Giving Marketing, LLC (PGM) is a marketing firm serving charitable institutions. Its first CRM, Insightly, did not entirely fit all business needs. Having used it sparingly for a year, the company needed a better solution. Then came Freshsales. What started as a free trial signup led to discovering an all-in-one small business CRM that now manages their sales process efficiently and effectively like never before.

Planned Giving Marketing, LLC

Founded in 2012, PGM helps nonprofit organizations across the United States raise funds by providing expertise in marketing. Through a multi-faceted marketing service ranging from newsletters to websites, PGM is successfully helping organizations inspire donors to make planned gifts.



*Allison Sanka
Director of Marketing Operations*

Allison shares why she discontinued using Insightly, and how PGM shows accelerated improvements in sales practices and productivity since introducing her sales team to Freshsales.

The Challenge

Allison focuses on developing sales outreach, identifying best leads, and tracking responses from marketing campaigns. To simplify her role, she wittily puts it: “*I market a marketing company.*”

For someone like Allison who’s entrusted to market and promote a business, introducing a CRM to her team was of paramount importance in order to follow a well-organized sales process.

PGM used Insightly for one year; however, for the final six months it was simply used to store customer data. Allison recalls that although at the time of choosing it appeared suitable, it didn’t prove to be a good investment for their small business.

“Over time, Insightly seemed like a basic contact management system, and didn’t offer much to improve our sales practice. After a while, we practically used it as nothing more than a database.”

Bulk editing is essential for a business like PGM that runs many marketing campaigns which demands constant update to records. Insightly’s limited capability on this feature was time-consuming for Allison and her team:

“At the time, there was no capability to bulk edit lead records which was a big inconvenience. We had to edit records one by one. Who has the time to individually edit hundreds, or even thousands of records?”

This limitation in Insightly grew increasingly inefficient with every new campaign, and so they discontinued using it.

Allison concurred to find a better [small business CRM](#) that would add more benefit to the team than require more effort.

“My main objective was to pick a system that adds value to my sales team, not one that gets in the way of doing their job.”

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Discovering Freshsales

Freshsales was recommended to Allison by a company that shares office space with PGM, which chose Freshsales as an [alternative to Salesforce](#) for their business. She took the recommendation, and signed up for a free trial.

When Allison reviewed what Freshsales offers [compared to Insightly](#), she knew her team could do and achieve more with it.

“We didn’t really know all the features we needed until we discovered Freshsales. So many new and beneficial features— like email tracking, and lead scoring (which was entirely new and fascinating). The bulk editing within the application itself is a huge time-saver for our campaigns.”

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Implementing Freshsales

For a business that runs email campaigns to generate leads, bulk emails and [email tracking](#) has been a game changer for PGM. Now they're able to get real-time notifications on email actions, and no longer have to seek for lead intelligence.

The screenshot displays the Freshsales CRM interface. On the left, a sidebar contains navigation icons for home, leads, contacts, accounts, deals, reports, and settings. The main area shows a table of leads with columns for Name, Lead Score, Lead Stage, Last Contacted Time, and Owner. A notification panel is open on the right, showing a list of notifications such as 'LEADS ASSIGNED', 'EMAIL OPENED', 'REMINDER', 'NEW TASK', and 'REMINDER'. An orange arrow points from the 'EMAIL OPENED' notification to the corresponding row in the leads table.

NAME	LEAD SCORE	LEAD STAGE	LAST CONTACTED TIME	OWNER
Jane Sampleton Sales Manager Widgetz.io	99	Contacted	12 days ago	Rebecca Moris
Tamesha Veigel Vice President of Sales Wilhelm, Evilde Jr	99	New	12 days ago	Rebecca Moris
Lera Houah Junior Sales Engineer York Services Jewel LL...	97	Interested	12 days ago	Rebecca Moris
Ben Majora Sales Research Director Voyager Fun Travel Ser...	94	Demo	8 days ago	Rebecca Moris
Kathryn Bonalumi Sales Trainee State Library	85	Demo	a year ago	Rebecca Moris
Mano Jac Sales Manager Y 105 Inc	75	Demo	a year ago	Rebecca Moris
Luz Broccoli Sales Research Director Wynn, Mary Ellen Esq	72	New	8 days ago	Rebecca Moris
Melina Orizabal Sales Trainee Sheraton Inn Sea Front	72	New	8 days ago	Rebecca Moris
Ezekiel Chui Senior Sales Engineer Sider, Donald C Esq	69	Demo	a year ago	Not available
Meaghan Garuff Sales Manager Bolton, Wilbur Esq	69	New	25 days ago	Rebecca Moris

Real-time notifications

“Freshsales helps us keep track of our campaigns. We know who’s engaging with our marketing and sales outreach for effective follow-up. We love that!”

Bulk emails, templates, and placeholders have saved time and improved productivity for the sales team. **With Insightly, sending bulk emails was a batch process, but now they’re able to send it in all one go.**

The screenshot displays the Freshsales CRM interface. At the top, there is a search bar with the text "Search by Lead, Contact, Account, Deal". To the right, there are buttons for "Feedback", "+ Lead", and a user profile icon. Below the search bar, the navigation menu shows "Leads" and "All Leads" with a dropdown arrow. A yellow arrow points to the "All Leads" dropdown. To the right of the navigation, there is a "Sort leads by:" dropdown set to "Lead score" and an "Import leads" button. Below the navigation, there is a toolbar with buttons for "Bulk email", "Assign to", "Merge", "Update field", and a trash icon. A message above the lead list states "25 leads are selected Select all 264 leads". The lead list contains five entries, each with a profile picture, name, title, score, status, last contacted time, and owner. The filter sidebar on the right includes sections for "Lead score", "Created at", "Updated at", "Owner", "Territory", "Lead stage", and "Last contacted time".

Lead ID	Name	Title	Score	Status	Last Contacted	Owner
1	Jane Samplet...	Sales Manager Widgetz.io	99	Contacted	7 days ago	Rebecca Moris
2	Tamesha Veig...	Vice President of.. Wilhelm, Evide Jr	99	New	7 days ago	Rebecca Moris
3	Lera Houah	Junior Sales Eng... York Services Je...	95	Interested	a month ago	Rebecca Moris
4	Ben Majora	Sales Research D.. Voyager Fun Tra...	95	Demo	9 days ago	Rebecca Moris
5	Kathryn Bonal..	Sales Trainee State Library	83	Demo	a year ago	Rebecca Moris

Bulk email, assign, merge and edit options

Allison affirms that with Freshsales, the team is achieving more sales outreach now than in the history of the company:

“Integrated Email and built-in Phone features are supercharging our sales outreach. Without them, we’d need twice the time and effort for email outreach and calling leads. The real benefit for us is in the amount we’re able to accomplish—engaging and prioritizing leads way more more than before. That’s how Freshsales is helping us bring more business in the door.”

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Freshsales keeps their eye on the ball

By using a CRM that visualizes what things look like by the minute, today, Allison is aware of everything that moves in her sales. She’s able to track sales reps’ activities, view lead responses, and see what’s in the sales pipeline.

Implementing Freshsales has provided a visual reference for PGM’s sales, and helps keep their eye on the ball in business.

“Before Freshsales, we were running a fairly loose process, but now it’s a tight ship. It’s helped develop and fine-tune our sales process tremendously. We’re able to work faster, and attain more volume in our sales activities than we were without it.”

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Your sales team doesn't need a
CRM and 5 other tools to drive sales

TRY FRESHSALES FOR FREE