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



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 <u>small business CRM</u> 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."

Discovering Freshsales

Freshsales was recommended to Allison by a company that shares office space with PGM, which chose Freshsales as an <u>alternative to Salesforce</u> for their business. She took the recommendation, and signed up for a free trial.

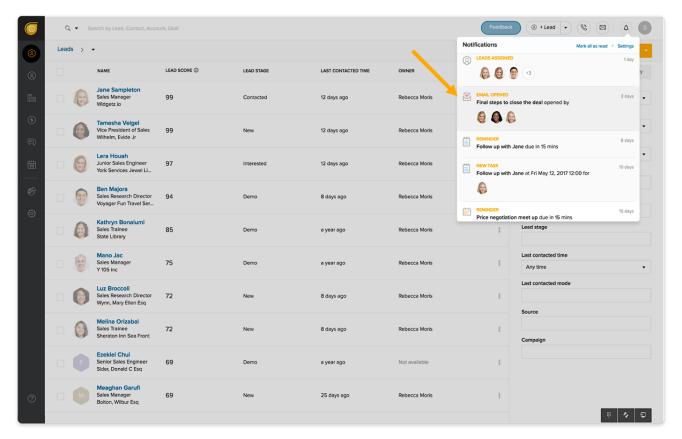
When Allison reviewed what Freshsales offers <u>compared to Insightly</u>, she knew her team could do and achieve more with it.

"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

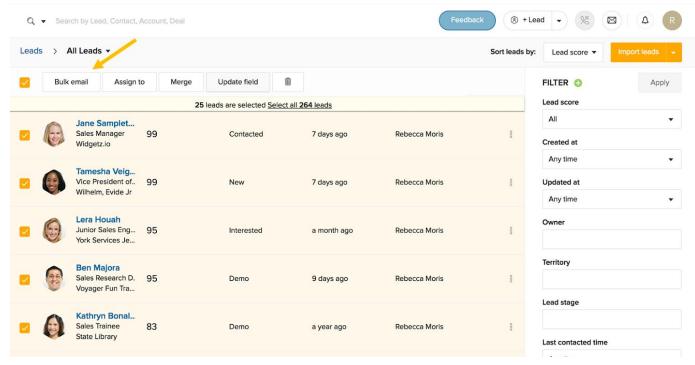
For a business that runs email campaigns to generate leads, bulk emails and <u>email</u> <u>tracking</u> has been a game changer for PGM. Now they're able to get real-time notifications on email actions, and no longer have to seek for lead intelligence.



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.



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

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