ProsperWorks CRM and G Suite help RHR International boost customer relations and sales

Business
RHR International LLP is an independent, global firm of management psychologists and consultants who understand the distinctive challenges and pressures that CEOs, board directors, and senior executives face. Its singular focus on senior leadership effectiveness, business outcomes, and research-based practice sets it apart from other executive and organizational development consultancies. For more than 70 years, RHR has been helping leaders and their teams transform themselves, and in turn, the performance of their organizations. RHR offers Board & CEO Services, Senior Team Effectiveness, Leading Transformational Change, Executive Development, and Executive Assessment.

Challenge
Small to medium-sized companies need Customer Relationship Management (CRM) software as much as larger companies do. They need to keep track of potential customers, manage customer data and interactions, and get help with the sales process. But big deployments like Salesforce are overkill for smaller companies, which lack the IT personnel required to manage CRM deployments. That’s the problem RHR International faced. A global firm of management psychologists and consultants providing development of senior management leadership of Global 1000 companies, RHR International was using CRM software that was underpowered, with few features and rarely used by its employees. It was looking for a solution to better manage its sales process and relationship with customers.

Solution
Several years earlier, RHR International had switched from Microsoft Office, Microsoft Exchange Server and Microsoft Sharepoint to G Suite, and wanted CRM software that would work with it. The company chose ProsperWorks CRM because it integrates with G Suite, is easy to use, affordable, simple to deploy, and offers a powerful set of tools for managing contacts and the sales cycle.

“We handle sensitive materials from CEOs and top executives of Fortune 100, Fortune 500 firms and Fortune 1000 firms. Because of that, G Suite’s built-in security features are extremely important to us — they’re more powerful than ones we could have developed ourselves.”
—Sarah Gilbert, Director of Operations and IT, RHR International

“ProsperWorks was a natural choice for us, because we had already moved to G Suite and were reaping considerable benefits from it. Because of its integration with G Suite, it was easy to get our staff up and running. ProsperWorks not only made it easy to centralize all communication but also gave us more transparency and visibility into our business. ProsperWorks really turned selling into a team sport,” said Sarah Gilbert, Director of Operations and IT, RHR International.
About ProsperWorks

ProsperWorks, CRM software for G Suite, helps companies sell more with a CRM that’s simple to use, deeply integrated with G Suite and highly automated to eliminate tedious data entry. The company has more than 75,000 users and 120 employees, and has raised $34 million in venture capital financing. ProsperWorks’ CRM solution has 154,000 installs on the G Suite Marketplace in the two years since its launch, and has a 4.8-star rating across 383 reviews.

www.prosperworks.com

Benefits

Better collaboration, improved sales

The ProsperWorks integration with G Suite allows employees to share documents more easily and get more insight into sales, all with enhanced security. With ProsperWorks, RHR International employees collaborate more frequently on sales efforts, track potential customers and deals, and can keep in better touch with customers. For example, when employees share sales contacts with each other using ProsperWorks, they often find that other employees already have close relationship with those contacts, helping employees better work together to close deals. The company also has a more accurate picture of its pipeline to better gauge sales projections. ProsperWorks uses the security built into G Suite, so RHR International data stays private.

Since ProsperWorks integrates so seamlessly with G Suite, RHR International staff required very little training in how to use it. Employees have adopted ProsperWorks quickly since the CRM sits right in their inbox and doesn’t change their existing workflow. The integration with Gmail has been particularly useful because it it allows employees to organize contacts, meetings, and customer communication all from one place — making it simple and easy to maintain customer relationships.

Savings and integration

G Suite is saving RHR International money and enabling the company to get more out of applications that are core to its business. Gilbert says that RHR International is saving 60-80% using G Suite. In addition, RHR International uses G Suite as the center of a group of powerful productivity tools including ProsperWorks and AODocs document management software.

“I believe ProsperWorks will help us sell faster and get higher-quality clients because of the way it allows people to share information and contacts across teams. It will make it easier for staff to remember the proposals they’ve sent out months ago and have yet to follow up on, leading to increased sales,” says Gilbert.