



Grow Your Business Rapidly with Powerful CRM



Freshdesk



Freshsales





Co-sell/cross-sell Pitch to CIO/Head of IT



Our understanding of **you, Customer**

Key Value Drivers



Text here



Text here



Text here



Text here



Text here



Text here



“By 2026, basic buying and selling experiences will be commoditized.

Businesses will differentiate based on connected customer & employee experiences.”

Gartner

2021



CHALLENGE

Siloed approach to sales, marketing, support



Pre Purchase

Sales compels customers to buy



Post Purchase

Support serves customers once they buy

Siloed teams, bloated software, complex tools

Data is siloed. Sellers can't see existing support issues.

Sales and helpdesk solutions are overengineered, have many tools, takes much time to implement/maintain

Support can't see all previously purchased products

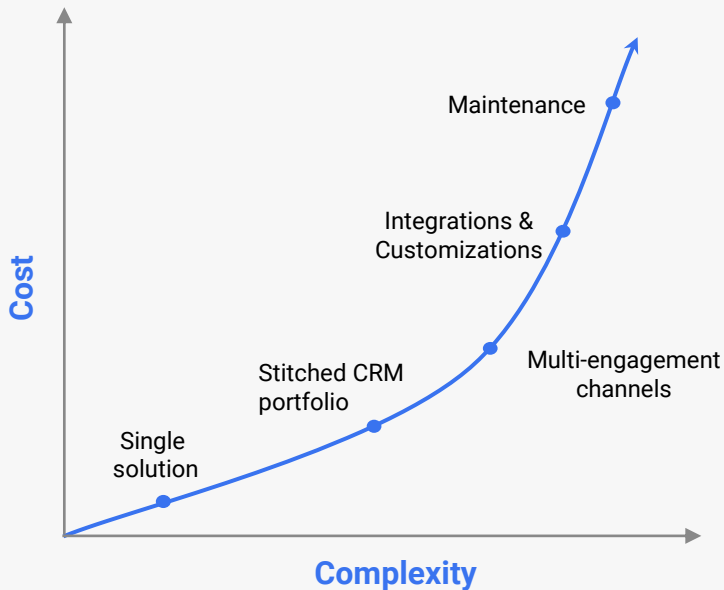


CHALLENGE

Escalating IT cost & complexity

With typical sales, marketing, support implementations

- Some CRM solutions **increase complexity and costs** due to ongoing integrations and customizations
- Maintaining such a CRM portfolio can be a **long term drain on IT resources** increasing costs over time
- Long term, a siloed CRM portfolio, **can limit company growth in sales, marketing, support**





GOOD NEWS

Simplify your CRM solution

With sales, marketing, support

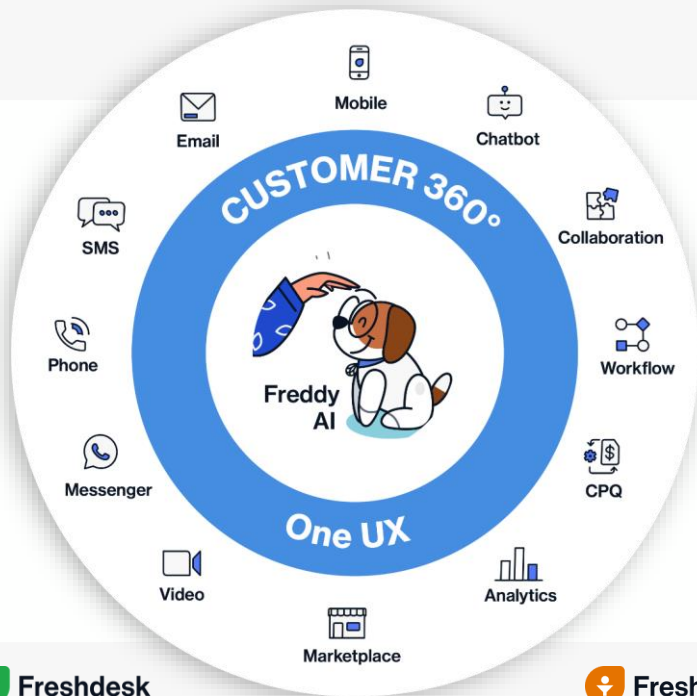
You contain cost and simplify your CRM

- **Easier to manage:** reduce IT requests from users
- **Faster** to implement and scale
- **Consolidate** applications
- **Increased adoption and growth** for the company





Simplify IT, sales, marketing and support



Reduce IT complexity & cost

Get an all-in-one CRM solution that's faster and easier to implement, and effortless to maintain. Unify solutions across sales, marketing and support.

Improve seller and agent effectiveness

Give support agents a complete view of sales history and enable them to serve customers better and upsell. Give sellers visibility into support issues that could affect a deal.

Grow customer value faster

Use built-in Customer 360° context and tools to engage your customers faster, surface the best contacts and next best actions using Freddy AI across sales, marketing and support.



Reduce IT complexity and cost

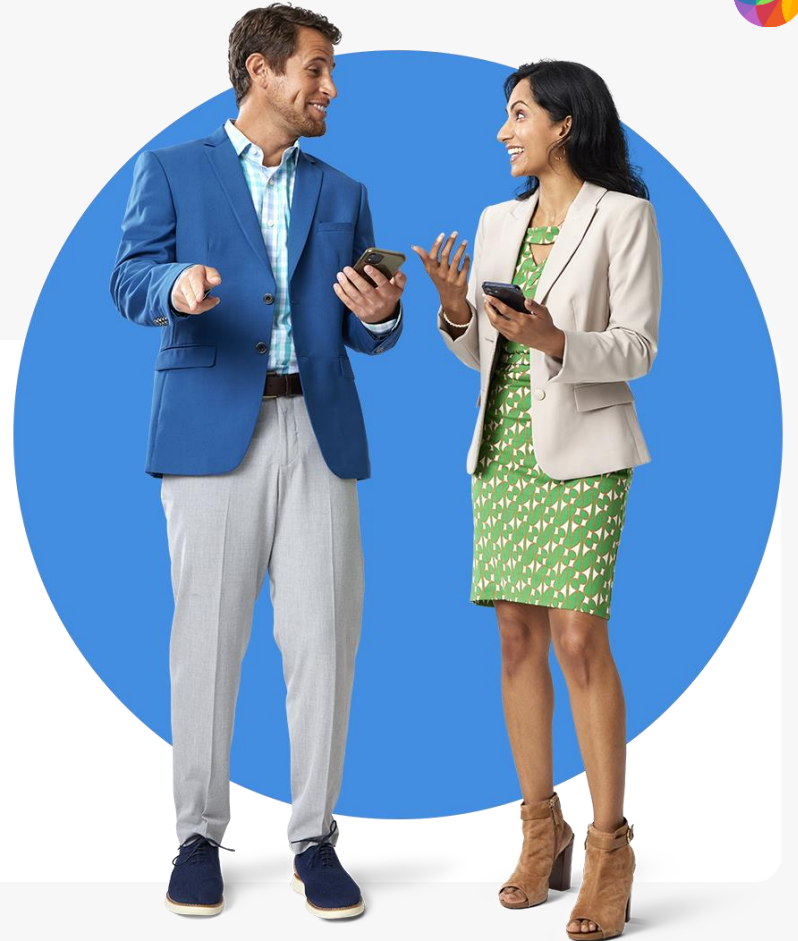
- Enable quick implementation and rapid adoption
- Stay ahead of the innovation curve with the latest CRM features updated by Freshworks and a global community of users
- Enjoy personalized Freshworks relationships as your partner and high touch customer support
- Scale and extend via Freshworks platform, workflow and app marketplace





Improve seller and agent **effectiveness**


- Deliver consistent UX for sales and support
- Personalize customer interactions across sales marketing and support
- Give sales visibility into critical customer support issues and prevent selling surprises
- Enable remote selling/remote support and collaboration







Grow **customer value** faster

- Surface the best contacts and deals for sellers through Freddy AI contact scoring and insights
- Respond to customers rapidly using built-in tools: email, SMS, phone, chatbot and mobile
- Use built-in Freddy AI to support customers better with next best action suggestions

 Likely to close




Your email follow-ups with [Helena Abbott](#) are at least 10x higher than what you usually have with customers.


Last prediction from Freddy: Mon Nov 30, 2020 12:29

 [Helena Abbott](#)  Demo completed **\$ 75,000**

Sales activities in last 30 days

| | SEPTEMBER | | | | | OCTOBER | | | | |
|-----|-----------|--|--|--|--|---------|--|--|--|--|
| MON | | | | | | | | | | |
| WED | | | | | | | | | | |
| FRI | | | | | | | | | | |
| SUN | | | | | | | | | | |



Low    High



What you can do next

Your emails are bringing you closer to the dotted line... don't stop!

[Send email](#)

Do you agree this deal is likely to close?  



Our Product Portfolio

Customer Solutions (CRM)

Customer Experience



Sales



Marketing



Employee Solutions

Service Management



Platform





Freshworks accolades

Sales Force Automation
Platforms MQ, 2019-2022

B2B Marketing Automation
Platforms MQ, 2020-2022



Sales Force Automation
Solutions
Wave Report, Q2 2021

Marketing Automation
Wave Report, Q3 2021

Core CRM Solutions and
CRM Suites: Q3 2022



G2 Crowd Leader
Freshsales, 2021, 2022

Freshsales Customer
Satisfaction Score: 92%





What if sales & support had **all the customer context** in every single conversation?

Freshsales Suite and Freshdesk is enriched with customer context from multiple sources

The old way



**Seller has no customer context.
Customer has to state the
obvious/ repeat themselves**



Sellers spend a lot of time enriching data about the customer in the CRM. This accounts for almost 20% of their time. Additionally, customers have to spend time giving sellers information over and over again, when there are multiple sellers/teams involved.



Better with Freshsales and Freshdesk



**Complete context on who the
prospect is, ongoing conversations,
history and support information**

Today, customers expect personal conversations and not generic cold-calls. Sales now has access to all of the background information, support tickets and history when talking with prospects. This reduces effort on background research, shortens sales cycles and drastically improves customer experiences and win rates!



What if you could turn support from a cost center to a **revenue center**?

Turn support into new sales and marketing opportunities

The old way



Support agents lack insight into full customer relationship

Support can't see all previously purchased products, and once tickets are resolved, sales opportunities are missed for cross-sell and up-sell.

Better with Freshsales and Freshdesk



Support and sales teams know customers better

Support agents have complete view of sales history to serve customers better, and drive upsell or cross sell. Sales/marketing has insight into support issues to optimize conversations and campaigns.



FRESHWORKS CRM CASE STUDY

Clopay empowers customer support and marketing teams to grow customer value with a **single C360 view**



America's Favorite Doors™

About Customer

U.S. garage door manufacturer with distribution via dealers and larger commercial accounts.

Business Challenge

Used <50% of legacy CRM functionality. Needed more integrated, cost effective alternative.

The Solution

Replaced 5 separate systems with a single, simplified customer tech stack with a unified platform.



Freshmarketer



Freshsales



Freshdesk



Sales, marketing and support together

Provide rich, 360 connected experiences across the customer journey and **SELL MORE** along the way

Helena Abbott

Score 95 Customer fit

Decision maker: Yes

Accounts: Acme University

Looking for: Analytics, Import option

Sales owner: Sara Jordan

Recently created deal: Acme_Super plan, Deal value: \$1,000

Deals by deal stage (\$1,500): Follow-up (\$1,000), Won...

Tickets: Open (2), Pending (1), Resolved (0), Close...

Marketing lists: Multichannel campaign

Last contacted via: Email Outgoing

Helena wants to increase license capacity and is also interested in multich... Show more

Sara Jordan

New > Contacted > Interested > Qualified > Negotiation > Won

Support Tickets

Marketing Campaigns

Sales Activities



Platform: **Neo Architecture**

A unified-first approach for digital experiences

Neo makes it easy to manage, easy to secure, easy to extend, integrate and scale

Unify Data

Provide a single source of truth across functions and products

Unify Process

Integrate, extend and customize complex business workflows

Unify People

Create connected experience for customers and employees



A natively built platform that enables customers to extend and integrate their business processes today, and adapt to business changes in the future





Neo is the **platform** for our CRM solution

Supports the entire customer journey:

Awareness

Engage and nurture prospects, create leads

Consideration

Gain 360 customer view

Decision

Get cross-functional insights

Support

Deliver outstanding customer experience





Easy to manage

Manage all things admin from one dashboard

A single console to manage admin settings across Freshdesk and Freshsales.



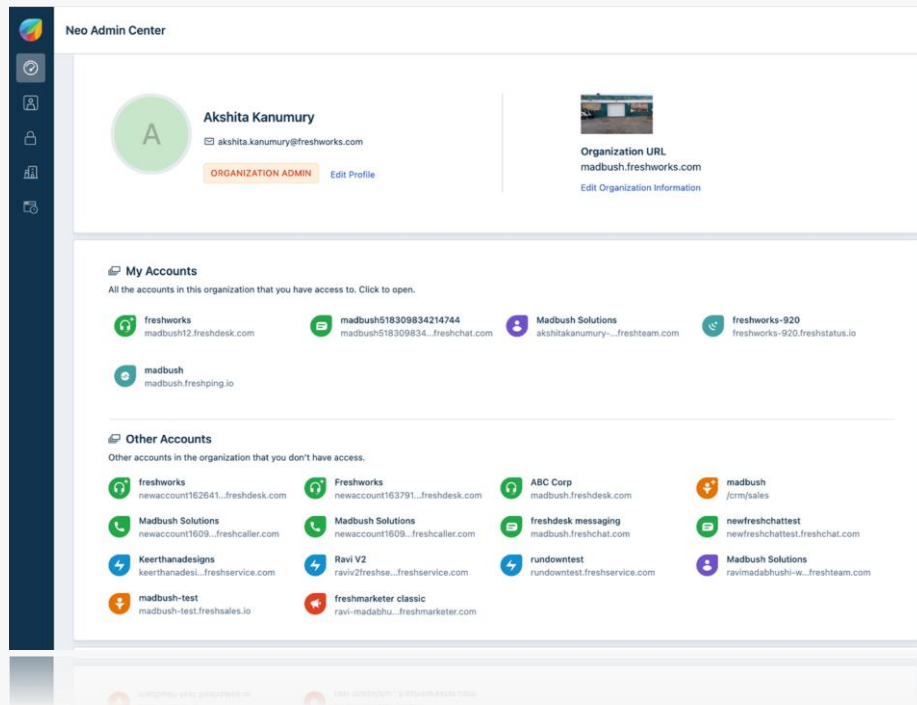
Manage user access, roles, passwords, invoices, new subscriptions and more.



Update organization URL, logo, icon, name and other details.



Access detailed audit logs for all users.





Easy to extend

Integrate and extend fast on your own terms

Private and marketplace apps are plug-n-play with all Freshworks products without complexity or compatibility baggage.



Freshworks Development Kit and exhaustive API documentation for pro-level devs.

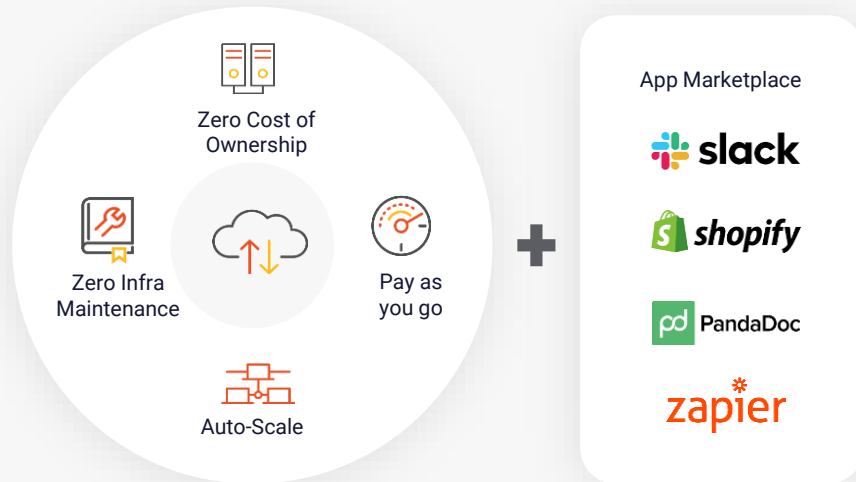
**Low-code experience for citizen devs.



Intuitive and personalized app marketplace experience native to the products.



'Advanced Technology Partner' with AWS. We leverage AWS Lambdas, Sagemaker, Amazon EventBridge and other services to deliver innovative experiences.





Easy to secure

Secure experiences for all

A single console to manage security settings across Freshdesk and Freshsales.



Define login policies for all users. Enable login via Okta, SAML, OneLogin, ADFS, Azure AD and more.



Go passwordless or setup rules on a password needs to be configured.



Enable (2FA) two-factor authentication to tighten the login process.

One policy for all

SSO Login

Password Policy

2FA



About Customer

Headquartered in Michigan City, USA since 1931; Dwyer Instruments has been a trusted leader in manufacturing innovative instrumentation solutions for the worldwide HVAC & process automation markets.



Freshworks Neo



Freshdesk



Freshservice



Freshsales Suite

Digital transformation of customer and employee experiences

Business Challenge

Departmental silos across sales, marketing, support and IT helpdesk led to broken customer & employee experiences and delayed decision making due to lack of insights.

The Solution

A combination of Freshdesk, Freshsales Suite, Freshservice and Freshworks Neo platform apps & services helped them digitally transform their operations. They become more streamlined and took faster data-led decisions.

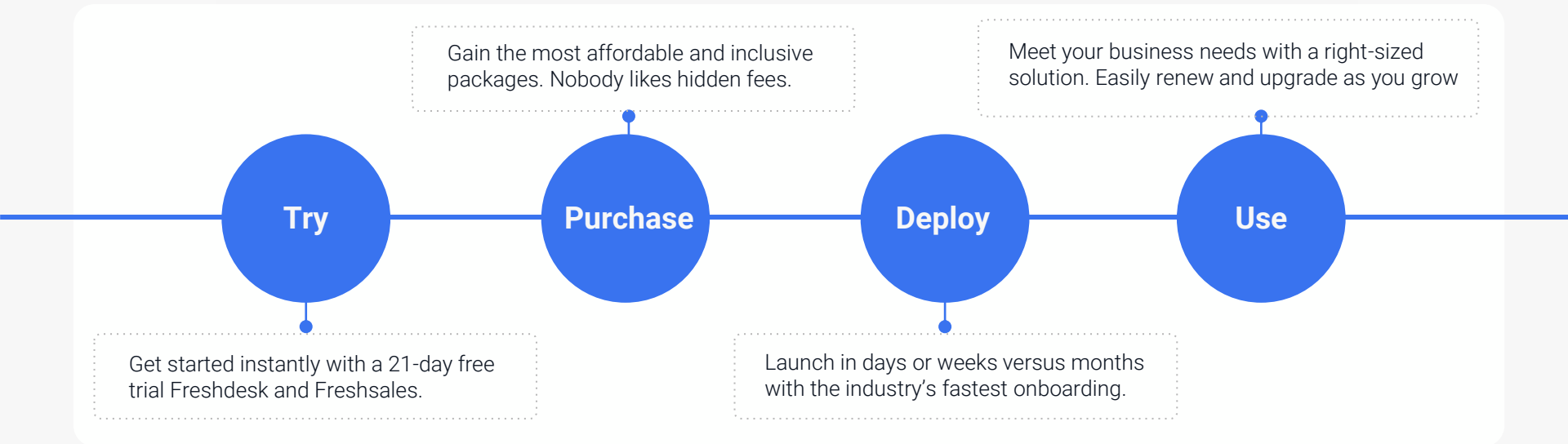
“There is an entire interconnected marketplace where you can find apps for your needs. You just need to click and add on rather than requiring some custom coded solutions.”

Zach Diamond, IT Developer



NEXT STEPS

How to **grow your business** rapidly with a powerful CRM



**Thank
you!**



Platform Architecture Addt'l Slides



Say hello to the **Freshworks Neo platform**

Customer Solutions (CRM)

Customer Experience



Sales



Marketing



Employee Solutions

IT Service Management



HR Management



Platform



Customer's Digital Workflows & Third-party SaaS Apps



Our platform. **Your vision.**

Open, flexible platform

An intelligent, customisable platform that you can extend to make your own

Customizable workflows

All the tools necessary to design unified, custom app experiences, low code automation

Powerful integrations

1200+ apps and a thriving app ecosystem to depend on



Enterprise grade security

Ensure world-class secure and reliable user experiences

Scalable workloads

Smart analytics for data-driven decision making across the customer lifecycle

Extensibility through rich

APIs Automate, customize and integrate your systems easily



Process Flow - Sample

Extended process slides for BFSI (Loan Management)
See Sales Playbook for more industry slides

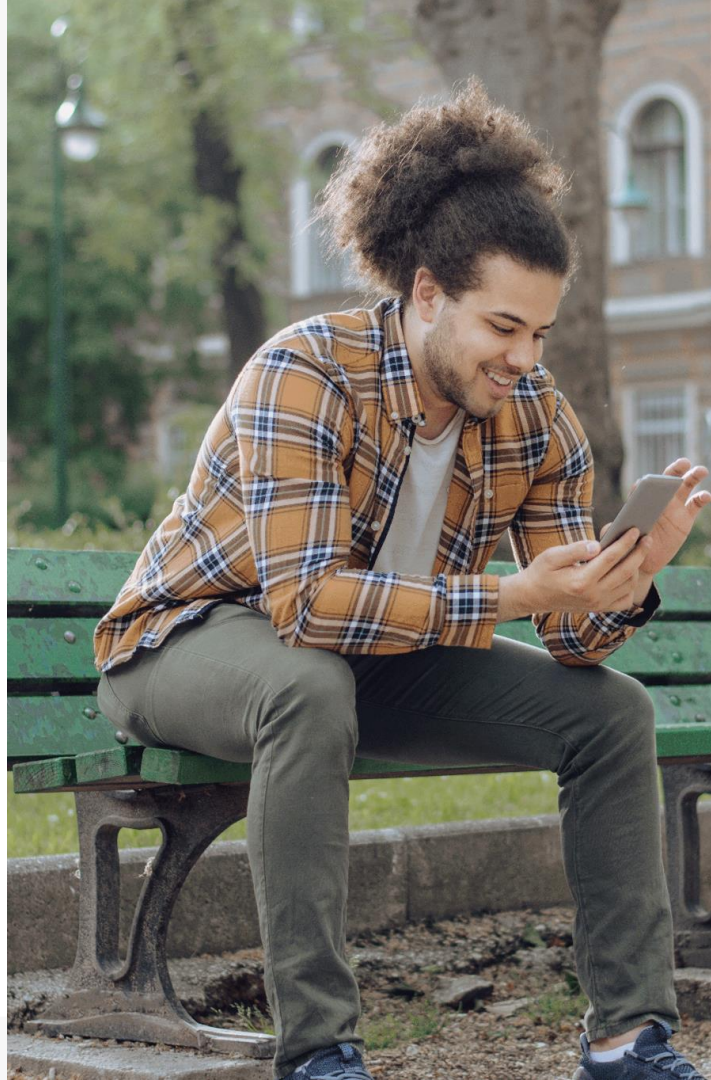
BFSI firm chooses Freshworks to better serve their millennial and Gen Z customers

Requirements

- Provide a self-serve customer experience **from sign-up to loan disbursement and post purchase support** for their new education financing products
- Get complete visibility into the buyer journey and history
- Simplify complex integrations between systems
- Modernize systems in order to build new processes

Solution

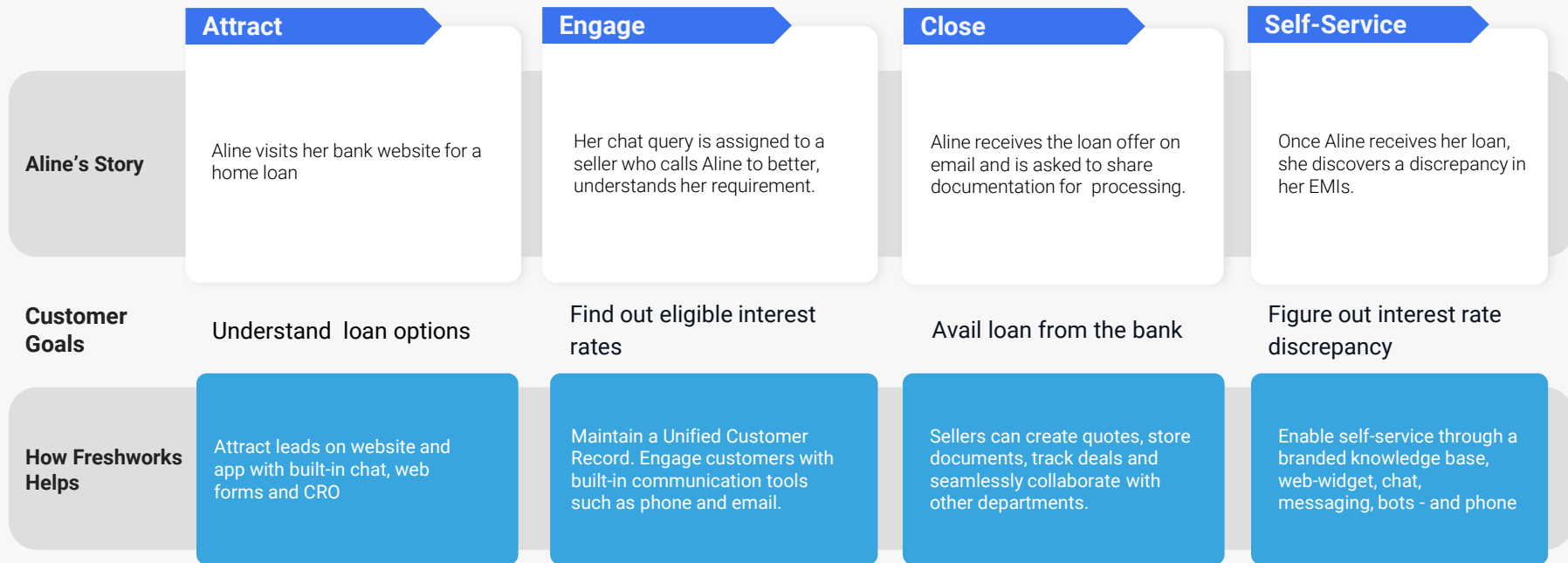
- Sales & Support with one vendor
- Ability to build customer journeys, create a self serve experience with Sales Sequences, Workflow Automation, Journey Builder
- Can see the entire lead flow in the sales system
- Cost savings as Loan Origination System & Incumbent CRM are replaced by one solution





BFSI

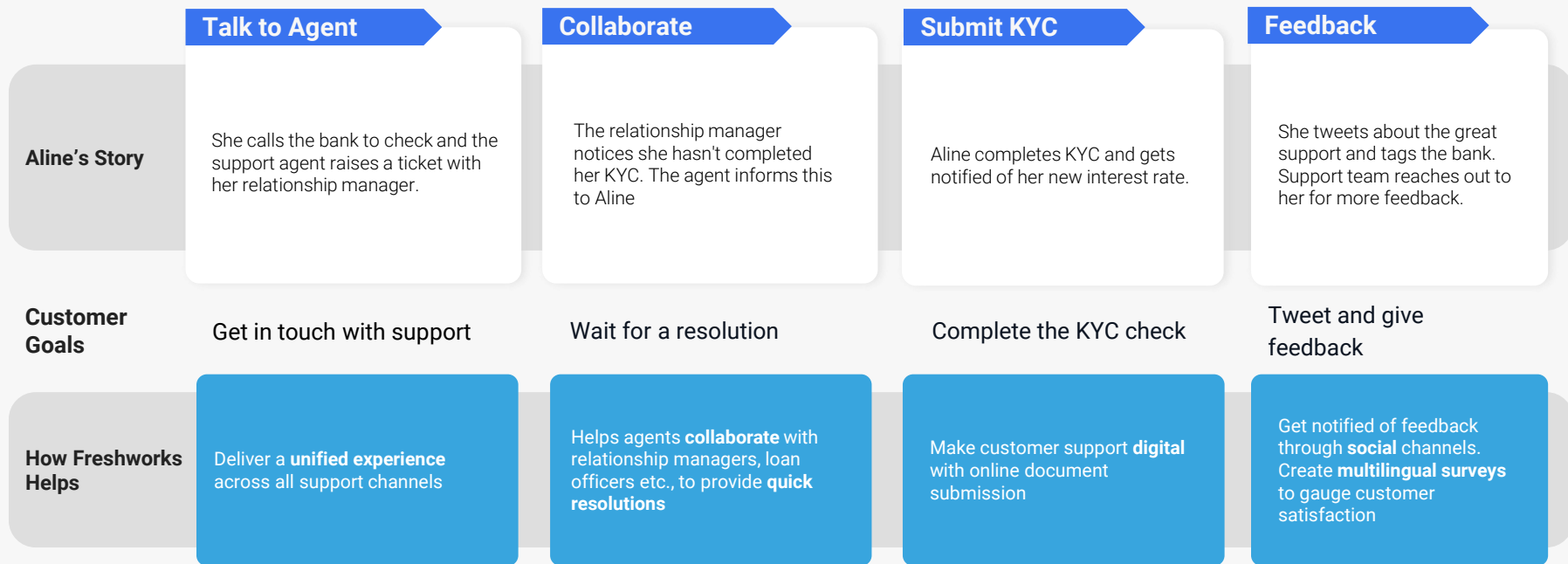
Loan Management Sales and Support Customer Journey (1/3)





BFSI

Loan Management Sales and Support Customer Journey (2/3)





BFSI

Loan Management Sales and Support Customer Journey (3/3)

