



# PIPELINE MANAGEMENT

HOW BUDDY CRM HELPED  
THE INSTITUTE OF DIRECTORS  
GROW THEIR SALES (BY DOUBLE DIGITS)





The Institute of Directors have used BuddyCRM since 2015 to re-energise their sales team selling professional development training courses to the director community. Buddy's sales pipeline visibility has enabled management to grasp the scale of sales opportunities.

### ABOUT THE INSTITUTE OF DIRECTORS (IOD)

The IoD has supported businesses and the people who run them since 1903. It is the UK's longest running organisation for professional leaders, dedicated to supporting its members, encouraging entrepreneurial activity and promoting responsible business practice for the benefit of the business community and society as a whole.

We spoke with Louise Gulliver, Managing Director at the IoD, about her decision to choose BuddyCRM as their sales team management app and the benefits that have entailed.

### THE CHALLENGES

The IoD had no method (other than Excel spreadsheets) of tracking the sales performance of their sales team who sell training courses to IoD members and the wider Director community. Without a centralised system of best practice, staff were working in a reactive and fragmented way. In addition, coaching and management had to be based on anecdotal verbal feedback from the sales team rather than actual figures on which to base forecasts.

In summary:

- No pipeline consistency or visibility
- Inability to self-serve reporting
- Lack of timely data / reporting
- Lack of consistency in sales approach
- Systems did not echo our sales strategy approach

### THE SOLUTION

Engaging Buddy in a consultancy role initially, a sales strategy was developed. However, it soon became obvious that a new system was needed, Louise commented,

**“Having implemented a sales strategy there was no way of tracking our performance in delivering the plan!”**

Louise had used Buddy in a previous role at another organisation and realised it was a natural fit for the IoD too.

**“Its simplicity is its greatest feature. It’s very sales focused. Plus we love the excellent and insightful service from the support team – they get selling and offer far more than a technical solution.”**

How easy or hard was it to get started with BuddyCRM?

**“Easy for me. No-one else in the team had used any sales automation tools and therefore any system would be unfamiliar. However, after a couple of weeks of use, they were all up and running.”**

## THE RESULTS

The initial resistance to change has been worth overcoming, as the IoD now has the means to see the activity of the sales team and what prospects there are in the pipeline. Louise felt that Buddy had given the IoD team...

**“Visibility, consistency of approach across our sales team as well as decision making based on objective insights. The service and support is 100% better than any I have ever experienced. It’s designed by “salespeople” for salespeople / leaders.”**

As well as,

**“Opportunity management, visibility of our sales pipeline from acorn to oak, a consistent approach across the sales team towards assessing opportunities and the ability to use ‘leading indicators’ have been immensely helpful.”**

## MEASURABLE IMPACT

**“BuddyCRM is part of our overall sales strategy and an important enabler of it. The sales strategy is yielding results and so by implication I attribute BuddyCRM as an important part of this. Pipeline size is the best it has been, sales volume has increased.**

**It was implemented within three weeks including transfer of 5,000 records from various spreadsheets. BuddyCRM has all the functionality I need, delivered by experts who take the functionality and technology as standard and focus on the delivery of real value by understanding sales.”**

To find out more about BuddyCRM

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