



## Conflux Consultants uses PieSync to keep Insightly and Outlook in sync



**Conflux is a team of individual professional businesses with specialist skills who collaborate to provide creative and marketing services to business. They build lists for companies looking to expand with the [List Building Accelerator Service](#) used by the World's Biggest Brands.**

[confluxconsultants.com](http://confluxconsultants.com)

*"PieSync saves me and my team a lot of time, but there's more to it : For me, this service means accurate data."* Clive Hornsby -Conflux

Located in Cheshire East, United Kingdom- Conflux Consultants Ltd. works to achieve a mission: to improve the first impression online of their clients and increase the ROI of all their marketing activities. About his business, Clive Hornsby says: "Everyone agrees that first impressions are critical for business, but not everyone can give a good first impression online. That's where Conflux steps in."

Like many consultancy businesses, a big part of their clients reach out to Clive and his team through referrals, but there's more to it. As Marketing Experts, Conflux Consultants understand the importance of SEO and Social Media to capture the right type of leads and offer them the right type of service. Currently, they are using PieSync to help them manage a solid database that they've created.

## **The Challenge**

Clive has a background as a Data Analyst. As a data expert, he understands the importance of quality data: “I’ve always worked on the basis that you need a set of Master Data and it has to be a reliable one. Once you have two copies of something you have a Data problem.”

So, how does a former Data Analyst and Marketing Expert manage his Contact Data?

After a new customer or prospect is detected via social media or makes personal contact, Clive will add them to his Outlook account.

However he and his team needed to centralise all their contact data into one central source of truth, so they could each get a 360° view on their customers and prospects.

The Conflux team chose Insightly CRM to fulfil this role.

“For me Insightly is my Master Data. The challenge was to keep all the other apps in sync with Insightly,” says Clive.

However, there was a lot of trial and error before the team discovered PieSync.

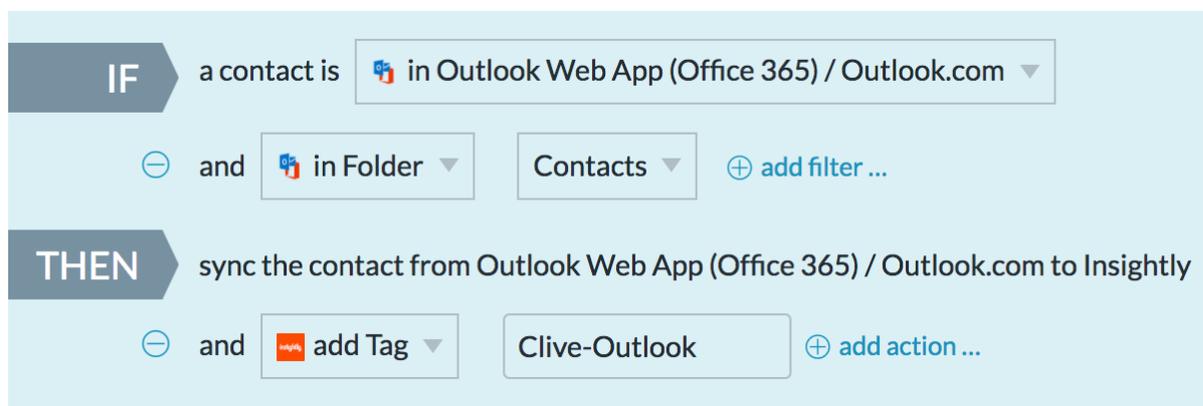
“Before PieSync, our contact management was copy and paste, import and export. We also used Zapier, but we had to be constantly pushing changes in one app or the other. It was time consuming.”

## **How PieSync Helped**

Conflux Consultant has established an integration with PieSync between Outlook and Insightly. This configuration synced all customer and prospect data to Insightly CRM, so the entire team has access to correct, up to date data.

Clive and his team categorize their clients according to their needs. If for instance, a prospect is concerned about his lack of reviews online and he has reached out to Clive, he will add this information about the prospect into Outlook. Thanks to PieSync, this crucial information is automatically synced to Insightly. Once it’s there, every team member has access to that information.

Conflux Consultants is also using PieSync's Intelligent Syncing Feature. "For me it's important to know track contacts back to the source. We add tags to know which member of the team referred a particular contact." says Clive.



The screenshot displays the PieSync configuration interface. It features two main sections: 'IF' and 'THEN'. The 'IF' section is triggered by the condition 'a contact is in Outlook Web App (Office 365) / Outlook.com' and is further refined by 'and in Folder Contacts'. The 'THEN' section performs the action 'sync the contact from Outlook Web App (Office 365) / Outlook.com to Insightly' and includes the step 'and add Tag Clive-Outlook'.

"Quality data and proper data segmentation are two key aspects of this business. If you have those, everything becomes a lot easier. But to do it manually is time consuming," says Clive.

## Future Plans

According to Clive, "PieSync is an important tool for Conflux's future plans." The Conflux team plan to add more apps to their existing stack, with concrete plans to create a 2-way sync between MailChimp and Insightly, using PieSync.

By using tags and the Intelligent Syncing feature, they will easily be able track Leads back to their source. Also, they will have the possibility to automate personalized email campaigns.

"PieSync saves me and my team a lot of time, and there's more to it. For me, this service means accurate data," says Clive.

## About PieSync

PieSync works in the background and syncs your contacts two-way and in real time. This means you'll have access to the most up to date customer information, no matter where you are or who entered the data. PieSync will help you to:

- ▶ Save time spent on data entry
- ▶ No more import/export of your contacts
- ▶ One database across all your cloud apps
- ▶ Sync changes, including deletions and unsubscribes, in your favorite cloud apps and CRM
- ▶ Keep track of your contacts, so you never lose a contact again
- ▶ Share accurate customer information across your marketing, sales and customer service platforms.

Try PieSync FREE for 14-days at [piesync.com](https://piesync.com).