

CASE STUDY

Customized Sugar CRM solution to improve client management and grow sales

Our client, an IT services and software solutions provider, needed a CRM solution to organize presales activities, manage customer relationships more efficiently, and grow sales. The OSF Global Services team customized the Sugar CRM solution so that it can be used for each internal sub-project and serve our client's specific requirements.

The Client

Our client is an IT outsourcing company with development offices worldwide and a large number of customers and projects to manage. The good news: their customer base was expanding at exponential speed and they had a backlog of projects. The bad news: they needed a sophisticated CRM tool that would allow them to enhance relationships with current customers, track individual projects, and reduce the costs associated with selling to new accounts.

The Idea

The company needed a customized, user-friendly, highly flexible CRM solution that could be used with each project and across teams in order to organize sales and customer activities, improve efficiency and reduce costs.

The Challenge

First the OSF Global Services team had to identify the appropriate CRM solution – one with a flexible platform that could grow as the company's business continued to expand. Then we would have to customize and implement the solution into our client's dynamic environment. To meet the challenges, our specialists proposed an open source CRM solution that could be customized with specific modules according to our client's requirements.

The Solution

The OSF Global Services developers implemented the Sugar CRM open source solution. They developed new modules; customized other specific modules for teams, groups, emails and reporting; and integrated the solution with the other applications our client was already using. The Sugar CRM solution helped our client improve presales activities, for instance enabling more powerful email marketing campaigns, and it facilitated the organization of all sales activities across the company.

Technologies

- Sugar CRM
- PHP
- Apache

The Results

The Sugar CRM implementation enabled our client to better organize sales activities globally and manage customer relationships in a more efficient and transparent way across teams and projects.

With the Sugar CRM implementation, our client benefited from a very dynamic, flexible solution:

- In **only 90 days** our client had a customized Sugar CRM seamlessly integrated with their revenue-cycle management system;
- Licensing and implementation costs were a fraction of their IT budget, with ROI projected at **9 months**;
- The solution reduced marketing and sales report development time from 30 minutes to 30 seconds;
- Our Sugar CRM solution empowered sales management to hold its staff accountable and work strategically with them to improve pipeline development and grow sales.