

EXPERT ERP GROUP REDEFINES DATA AND CAMPAIGNS TO DRIVE GREATER REVENUE WITH LESS EFFORT

THE COMPANY

e2b teknologies has been working in enterprise resource planning (ERP) since before Gartner first coined the term in 1990. That's when Lynne Henslee, president of e2b teknologies, founded the company with her husband to help customers in industries like manufacturing, distribution, and cannabis develop, implement, and integrate business applications.

When these customers need help solving big business challenges, they turn to e2b teknologies for help improving inventory accuracy, schedule management, and shipping logistics. And in an age of constant flux and new considerations brought on by the pandemic, these customers need reliable ERP expertise more than ever.



COMPANY TYPE

Technology

LOCATION

Chardon, OH

WEBSITE

www.e2btek.com

SOLUTION(S) BEFORE BRAINSELL

Basic Spreadsheets

Basic CRM

SOLUTION(S) AFTER BRAINSELL

Sugar Sell

Sugar Market



THE PROBLEM

Sales and Marketing Should Work Together, Not at Odds

When e2b technologies first began tracking customer data, it relied on basic spreadsheets. Once the company reached 12 employees, it invested in its first CRM system. But as the company grew, the CRM functioned as more of a gigantic “catch all” than an actionable revenue driver. It was difficult to search, frustrating to use, and data was often inconsistent or inaccurate. More notably, the challenges it presented began driving a wedge between sales and marketing teams.

That’s when Lynne attended her first CRM conference and learned that other companies were using CRM in a completely different way—one that was prompting a complete paradigm shift in the industry. They were advocating for CRM as a company’s primary data hub to produce a clearer-than-ever 360-degree view of each customer, rather than the traditional reliance on ERP solutions to do everything.

“I came back and saw the world in a different way,” said Lynne. “If we used CRM appropriately, we could connect marketing, customer support, development, and sales and have a view of all the touches associated with a customer. It was an ‘aha’ moment for me.”

To make CRM as effective as possible for e2b technologies, Lynne and her team needed to

reevaluate its existing solution and look for a system that would allow the company to organize and act on its data instead of simply housing it. e2b technologies knew it wanted a cloud CRM to replace its existing on-premise solution so sales could access the system when in the field.

The company compared multiple CRM providers, but found that the bigger companies were not only too expensive, but overwhelming in their offerings.

FROM THE SOURCE:

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– *Lynne H, President,
e2b technologies*

THE SOLUTION



A Clearer Picture of Customer Data

e2b technologies turned to SugarCRM to activate its data, connect departments, and view all customer information in one place.

"Sales and marketing were able to function together versus in two different departments," said Lynne. "We were able to quantify what we were doing. Even if the data wasn't perfect, we knew we had to start somewhere."

Yet, e2b technologies was using just one instance of SugarCRM to manage three divisions—its development business, consulting agency, and a calibration subsidiary—forcing the solution to become everything to everyone. Plus, e2b technologies wanted to begin nurturing leads in a more efficient way with marketing automation.

That's when the company brought on SugarCRM solution partner BrainSell to help it implement Sugar's new marketing automation tool Sugar Market. Until then, everything was labeled generically as a campaign.

With help from BrainSell, the team dissected the legacy data into four buckets based on which team

it belonged to, devising a new system to organize incoming information.

"We were a clean slate," said Lynne. "BrainSell was willing to share best practices, what they themselves do, give us suggestions, and not just force us, but work with us. BrainSell is exactly what we look for in a business partner."

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THE RESULTS

Letting the Software Do the Work

Now with simplified, organized data, e2b teknologies can actually use the information it collects to run reports and design ongoing marketing campaigns with point-and-click functionality. And because each team has a shared view, sales has immediate access to a host of granular data like email engagement metrics to assess customer interest and measure success.

Plus, e2b teknologies uses Sugar Market to rank and score leads once they're in the funnel, assigning different point values depending on what content the prospect interacts with. Instead of employing one or two people to continuously assess leads, the tool automatically feeds more organic opportunities to sales with a goal of increasing conversions instead of relying on purchased lists or cold leads that waste time.

FROM THE SOURCE:

"It does the work of one or two people that don't have to spend their time identifying the warmest leads."

— *Josh G, Marketing Manager,
e2b teknologies*



Today, marketing automation accounts for 15% of the company's marketing budget instead of spending it on employees to gather and analyze the data.

"I'd rather bring on additional sales employees to drive revenue than additional marketing employees to do tasks," said Lynne.

The company's practice manager is able to easily send weekly reports to department heads with dashboards that keep the company up to speed on key metrics, giving employees time back to focus on more important tasks like building customer relationships.

Having a cloud-based CRM and marketing automation solution in one allows e2b teknologies to connect and collaborate over a single hub of information, allowing teams to run leaner and even function remotely.

"Today, if it's not cloud-based, it doesn't exist," said Josh. "Sugar's ahead of the game in that regard."



About BrainSell

BrainSell helps companies thrive by solving business challenges with expert guidance and best-of-class technology. We have offered unbiased software selection, implementation, support, and consulting services to clients of all sizes across North America for over 25 years.

Our methodology involves helping clients identify the clearest areas for potential improvement in their processes. If technology can help you, then the BrainSell team can guide you on your path to business growth.

Want to learn more? Reach out today to talk with one of our growth enablement experts!

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