

CASE STUDY:

Linux Foundation Uses Sugar as the Core of its Business Operations

Linux and W-Systems Implement State-of-the-Art CRM System.



The Linux Foundation
linuxfoundation.org



With a state-of-the-art CRM system that is tailored to the foundation's specific business processes and integrates SugarCRM and Pardot's marketing automation platform, the Linux Foundation is able to coordinate business activities worldwide using their CRM system as the foundation of their business operations.

Here's How They Did It

The Linux Foundation — the non-profit consortium that is dedicated to fostering the growth of the Linux Operating System — is a tale of modern business success. The Linux operating system powers everything from the New York Stock Exchange to Android smartphones and interest in Linux is booming globally. But with that growth has come huge demands on the distributed and highly skilled team that runs the foundation. Survival means continuous process improvement, automation, and tight coordination between staff members located throughout the world.

The Linux Foundation realized that a CRM system tailored to their needs and accessible by everyone in the organization was critical to their survival. Without technology to coordinate business activities, track interest in the foundation, and follow-up on leads, there was no way Linux advocacy could progress as the founders of the organization had envisioned.

The Path to Success

Through a relationship with Sugar CRM CEO Larry Augustin, The Linux Foundation was already well acquainted with SugarCRM when W-Systems's Engineering Manager Eric Wikman was

lucky enough to meet Linux Foundation COO Mike Wooster on a flight from California in 2010. The Linux Foundation was in search of a qualified business partner capable of taking their SugarCRM system to the next level.

Right away the project benefitted from the Linux Foundation's clear vision of how enhancements to their CRM system could make their business run more smoothly and efficiently. Rather than starting with requirements gathering and process design, W-Systems jumped right into the first phase of enhancements for Linux. As we have done with other clients, we broke the project budget into blocks and then targeted feature developments to be completed based on the Linux Foundation's priorities.

Our first set of tasks was integrating information between SugarCRM and The Linux Foundation's web properties so that all leads and contacts were being logged correctly in the CRM system for follow-up. Once these tasks were completed and the working relationship between W-Systems and Linux was tested, we moved forward with a wider variety of system enhancement. The key features developed are listed below.



Learn more at www.w-systems.com

Tagging

W-Systems built an extensive tagging system into SugarCRM that allows the Linux Foundation to tag leads and contacts in creative and flexible ways.

Custom Reporting

Using tags as the basis for selecting and filtering data, The Linux Foundation has deployed a wide array of custom reports and dashboards that show the status of leads and contacts. Automatic target lists – When tags are assigned to a lead or a contact, custom W-Systems business logic keeps leads and contacts synchronized with target lists throughout the CRM system. This means that email campaigns are always up-to-date with the current people on each distribution list.

Pardot Deployment and Integration

As The Linux Foundation made great use of email communication to members, leads, sponsors, and other constituents, a more sophisticated email marketing platform was required. W-Systems deployed the Pardot Marketing Automation platform and integrated the system with SugarCRM so that leads, contacts, and campaign data is synchronized between Pardot and SugarCRM.

Constituents Requests

Linux Foundation staff interacts with a wide array of constituents throughout the world. They attend training sessions, conferences, and other events hosted by the Foundation and aimed at increasing awareness and use of the Linux operating system. To help streamline and facilitate these events W-Systems has worked with the Foundation to develop a portal that collected travel visa requests, travel expense requests, and expense reimbursement requests and filters them through SugarCRM for tracking and fulfillment.

Success Factors

Communication

Its impossible to understate the importance of consistent and clear client communication. W-Systems's lead engineer talks with Linux Foundation personnel at least once a day while active development is underway. By keeping in close contact issues are resolved immediately and development progresses very smoothly. Agile development – With the Linux Foundation actively involved in reviewing and testing W-Systems's work, software quality increases and any misunderstandings of client requirements are identified and corrected immediately.

Shared Vision for System Success

W-Systems benefits from The Linux Foundation's high level of technical experience and a predisposition toward business process automation. Because they have a clear vision of where they want their organization to go and how their CRM system plays a critical role in that strategy, The Linux Foundation is able to communicate requirements very efficiently, allowing W-Systems to move quickly to build tools that make their organization better. Would you like to see how tailoring a CRM system to fit your specific business processes can drive efficiency and keep administrative costs low? Contact W-Systems and we'll show you how.



“W-Systems has been great to work with. The team is very experienced, highly competent, friendly, and they are good communicators.”

Mike Wooster, COO