

CASE STUDY:

# Hyland's Improves Business Operations with Sugar

Hyland's Gains Efficiency in Sales Order Process



Hyland's  
hylands.com



Hyland's, manufacturer and distributor of homeopathic medicines since 1903, chose SugarCRM to seamlessly share, track and manage information between the sales and customer care teams. To customize Sugar's Quotes module, Hyland's turned to W-Systems to make it more efficient for the users. Hyland's no longer has a need for a third-party vendor to manage the order process, which has reduced costs.

## Business Challenges

Before implementing SugarCRM, Hyland's did not have a sophisticated CRM system and it was difficult for the 34 Sales and Customer Care Representatives to share information and insight into customer accounts. A common issue was a lack of transparency of activity among team members. For example, a sales representative would visit a retail customer and shortly after the visit a member of the customer care team might call that same customer, not knowing that a Sales Rep had recently met with them. It was inefficient because there was no formal process for sharing information and no system to enter, manage and track prospect and customer data, and sales activities. In addition, Hyland's had limited reporting tools for quickly identifying which products were carried in specific stores throughout North America and internationally. Hyland's needed a CRM solution to better manage internal operations and improve the customer experience.



"Sugar is a night and day improvement from what we had before."

## The Path to Success

As Hyland's began experiencing the power of Sugar, a need was identified for customization to the Quotes module. Nancy Rosen, a special projects coordinator, led the selection process to find a SugarCRM solutions partner to develop and implement the customization they required. With a short list of five potential partners, Rosen became increasingly discouraged as each one said the customization could not be done. "I had one last potential on my list which was W-Systems. We wanted this customization so badly because without it we couldn't launch a certain feature that would, and did, make our sales representatives able to adopt it in the field. We had to have it," recalls Rosen. After meeting with W-Systems, Hyland's was thrilled to learn the customization they envisioned for their sales order process was possible.

W-Systems customized the SugarCRM Quotes module to improve the way that turnover orders are built and emailed to distributors on behalf of customers. Prior to the customization, Hyland's Sales and Customer Care Representatives had to manually select each product on the order individually, save it and repeat the process for every product added to the order. Because Hyland's can have a hundred products in just one Quote, the process was tedious and time consuming for staff.



Learn more at [www.w-systems.com](http://www.w-systems.com)

W-Systems customized the module so representatives can now select multiple products all at once before saving. "It is a night and day difference from what we had before," said Rosen. In fact, the customization has worked so well that Hyland's has implemented the process for internal requests between Sales and Customer Care Representatives.

## Success Factors

### Cost Savings

Because turnover orders are now efficiently built in Sugar, Hyland's discontinued an annual subscription for software from a third-party vendor resulting in significant cost savings. Furthermore, the convenience of having orders processed directly in Sugar and all the information stored in one place is invaluable.

### Better Communication

Sales and customer care teams can easily and quickly share information in Sugar resulting in improved communication, less frustration and better accuracy of information.

### Improved Workflow

One of the advantages with Sugar is the ability to create tasks related to accounts to eliminate the need for emails constantly

going back and forth between employees. Sugar has also been helpful in correctly identifying and managing accounts with the same store name, reducing confusion and inconsistencies in data.

### Greater Efficiency

Uploading marketing lists to the CRM system allows Hyland's to establish qualified targets and track those targets as they convert to leads and eventually accounts. This has been beneficial in efficiently and accurately managing a large amount of marketing data and helps the company roll out new marketing and sales initiatives more effectively

### More Powerful Reporting Tools

Hyland's can now run reports on all the data found in Sugar. Data and information from the many reports available in the CRM system provide Hyland's with the insight to develop and tailor business initiatives. The company has also set up Key Performance Indicator metrics to track objectives and results for Sales and Customer Care Representatives. At a glance, managers can gauge how individuals are performing and where improvements may be needed.



"The whole experience was very positive and our customization is working like a charm. It is the story of the year from our point of view because it was so important to us."

Nancy Rosen, Special Projects Coordinator