

CASE STUDY:

Removing the Barriers to Productivity with Sugar

W-Systems and Sugar have Helped BASIC Streamline and Reap Huge Time Savings.



BASIC
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Anna Mulder is the Marketing Manager for BASIC, a Michigan-based integrated HR solutions provider. Founded in 1989 in Portage, MI, BASIC now has offices around the country and serves over 10,000 employers nationwide.

For the past five years, CRM has played an increasingly critical role in their business. After taking their previous CRM tool to its limits, Anna and her team settled on SugarCRM, with the help of W-Systems, to help them grow to the next level.

This case study highlights how Sugar is streamlining their business processes and enabling greater synchronization between satellite offices. For the past five years, CRM has played an increasingly critical role in their business. After taking their previous CRM tool to its limits, Anna and her team settled on SugarCRM, with the help of W-Systems, to help them grow to the next level.

Removing the Barriers to Productivity

While their present CRM was cost-effective to start, they began to run into storage capacity limitations. Also, when they needed support, they found it unreliable and difficult to come by. Furthermore, the customizations they required were proving to be problematic with the rest of the platform.

The sales and marketing teams at BASIC knew that a lot of their work could be done more efficiently if functions were brought together into one tightly-integrated system.

The Biggest Bang for Their Buck

After reviewing several cloud-based CRM platforms, including Salesforce, they settled on SugarCRM. One of the big factors was workflow integrations. Salesforce and Sugar both offered them, but Salesforce required additional fees while Sugar included them out-of-the-box. According to Anna, "It came down to getting the best functionality at the best price point."

The competition simply couldn't compare to Sugar's total cost of ownership. But, for BASIC, that was just the start of the benefits.



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For example, they used to have pricing data and proposals stored and created in separate systems. To get a proposal took an average of 24 hours. Now, with Sugar's built-in connectivity to their PDF creator, XperiDo, Anna says "we can do proposals in about 5 minutes."

They were also able to build and manage pricing parameters from one central location, giving BASIC's field reps leeway for applying discounts without needing approval, another huge time saver.

Another benefit is the greater ease with which leads and pricing for different territories are managed. Sugar allows Anna's team to set up custom criteria based on zip code and company type so that leads are automatically assigned to the proper sales reps. They can also control pricing variations from one central location, another productivity booster.



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And the List Keeps Growing

With the adoption of Sugar, Anna's team discovered MailChimp for Sugar, an integrated email marketing solution. Prior to this, email campaigns were, in Anna's words, "very difficult." Each campaign required them to push and pull new lists between different systems. The integration with Sugar has made the process easier and streamlined both creation and analytics.

As BASIC looks further down the road, they're discussing plans for integrating with accounting and finance. Their experience so far gives them confidence that Sugar has the potential to greatly simplify and expedite their billing processes.

And they're comforted by the fact that they'll have help when the time comes. "It's nice having a partner like W-Systems who we know will be there for us when we're ready," said Anna.



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Anna Mulder, Marketing Manager