

CASE STUDY:

# GS Marketing Improves Customer Relationships with Sugar

Custom Sugar Instance Reduces Data Entry Mistakes by 100%.



GS Marketing  
gsmarketing.com



GS Marketing is a full-service marketing agency for the automotive industry. They have been working with automotive dealerships for over 30 years to provide digital, retention and direct marketing services. GS Marketing is known for its outstanding customer service and works with clients as large as Toyota Motor Sales.

## Business Challenges

GS Marketing initially implemented a different CRM platform and was struggling to receive any return on their investment. After they spent an entire year trying to make it work optimally for their users, they decided to search for a new solution. Jackie Ferrara, Strategist of Account Services, Products, and Systems at GS Marketing, was selected to be on the CRM team which evaluated alternative CRM systems. "Our system wasn't user-friendly for anyone. Our reps in the field had a hard time accessing the system and it was constantly crashing," said Ferrara. GS Marketing was using their CRM to store customer info, but because the system didn't have all the features they needed, they were also using group email accounts for support cases and excel spreadsheets to track product history. They wanted to streamline their tools down to just one and create efficiencies that would save time.

## The Path to Success

GS Marketing's goal was to implement a new CRM system that allowed anyone in the company to easily access customer information and encouraged data to be consistently entered. "Our main focus was to be able to look at our customers at a glance. Who is our Customer? What are they doing? We needed a place to keep this all together," said Ferrara.

Their requirements for a new tool included:

- Easy to use with an intuitive user interface
- Remote access for sales reps in the field
- Flexibility to track product history, touch-points, email performance and more

GS Marketing needed a tool that could adapt to their needs and Sugar fit the bill. Additionally, the affordable price allowed them to buy a seat for every employee so that the CRM could be used across multiple divisions. W-Systems worked with GS Marketing to determine their requirements. W-Systems then developed customizations that would solve GS Marketing's CRM needs for several departments across the organization. Some of the customizations developed by W-Systems's engineers include:

- Modifications to the Campaigns Module that automatically creates calls for sales reps using a scheduler to encourage customers to renew their product subscriptions
- Assessment tool which reads SEO, social media, and website optimization scores and pulls these rankings into Sugar so that sales reps can offer customers advice on improving their marketing efforts
- Case Management Module which pulls from a web



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- support form and automatically creates Cases in Sugar
- Product History Module which displays a history of all services an Account has ever purchased, even if they are no longer subscribed to it
- Reports Module that allows more complex data to be

displayed in very concise ways, bridging the gap between basic reporting engine in Sugar and expensive third-party reporting software



“Before Sugar, we didn’t have any trackability. Now we can hold sales reps accountable and talk to our clients intelligently so we can help them.”

## Success Factors

Overall, the customizations they implemented have a common thread that allowed them to improve their customer service through increased sales rep accountability, consistent tracking of touch points and ability to solve recurring problems by getting a big picture view. This is invaluable to GS Marketing because of their dedication to customer service.

The following are all elements that GS Marketing believes led to the success of their CRM:

### Flexibility of the Platform

The openness of the Sugar Framework allowed GS Marketing to adapt their CRM to their business model, rather than adapt their business model to an existing framework. “We needed a CRM that would retain information at the Account level when a contact changes companies, because everything we do for a Contact is based on what the Account is requiring of us,” said Ferrara. “We couldn’t find any CRM that did that, except with a custom instance of Sugar.”

### Strong Relationship with a Sugar Partner

GS Marketing felt that their working relationship with W-Systems has been of great value to them. “I can just pick up the phone and someone always helps me really, really quickly,” said Ferrara. “W-Systems gives great customer service like we do. People do business with us because we put customer service first, and that’s why people should do business with W-Systems.” Their assigned W-Systems Engineer, Keith Neuendorff, knows their business very well because he has been working with them for several years. “It’s very helpful to talk to someone who knows your business, so you don’t have to start over every time I need something done,” said Ferrara. “There have been times that Keith has made suggestions for us because he is knowledgeable enough about what we do.”

### Increased Cross-Department Communication

GS Marketing uses Sugar to increase accountability, transparency and communication between divisions. They are

no longer sending emails to notify management of what calls they are making or sharing spreadsheets to let finance know what customers are subscribed to which products.

### W-Systems Training Hours

GS Marketing purchased an admin training package which enables them to configure their Sugar instance in-house without a developer, saving them time and money. The ability to create fields and edit views helps them enforce user adoption by making the system easy to use. “We know salespeople want everything right at their fingertips but they don’t want to have to use their fingertips. We wanted to make everything as easy as we could for the sales people,” said Ferrara. By creating fields that auto appeared based on product selection sales reps spend less time entering data and are more likely to use the system.

### Workflow Automation

Automation has reduced stress for sales reps and created time efficiencies. One example is a workflow which creates tasks automatically for the right people when the information for an account changes. This keeps information up-to-date and prompted reps to follow through with updating information in other systems. “That process created 100% improvement in mistakes being made with information changes,” said Ferrara. “Dealers change information very often, and since we implemented Sugar we haven’t had one mistake made because someone forgot to update the information. It’s awesome!”

### Remote Access

One of GS Marketing’s key requirements was for sales reps to be able to easily access the CRM from the field. In order to do this, W-Systems designed a secure hosting strategy for GS Marketing and purchased additional equipment that suited their security needs. “W-Systems made it so that our remote and field reps no longer have difficulty connecting to the CRM, but it’s just as secure,” said Ferrara. “They went above the norm for us in order to fit our hosting needs.”

### Increase in Accountability Across the Company

Because Sugar allows divisions to track everything from past purchases to calls and meetings, the accountability of employees increased ten-fold. Sales Reps, Customer Support Advocates, and Marketers are now all reminded to track customer touchpoints and are held accountable for tasks assigned to them. That information is also available to management at a moment's notice. "Before we didn't have any trackability," said Ferrara. "Now we can hold sales reps accountable and talk to our clients intelligently so we can help them. And internally we can better coach those who need help improving customer relations."



"Sugar has increased communication between sales reps, eliminated mistakes, and increased consistency and efficiency across our organization."

**Jackie Ferrara**, Strategist of Account Services,  
Products, and Systems