

CASE STUDY:

# Breakout Possibilities

Kasina's customer focus drives sophisticated integration with Sugar.

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All businesses that offer products and services have similar needs: primarily being to elevate awareness of their offerings and deepen strategic relations. Companies of every kind need to ensure that their products are known and desired.

Asset management firms are no different—and Kasina, a tech-savvy consulting firm, offers consulting skills to high-profile asset management companies who wish to maintain or build relationships with their financial advisory clients.

Google 'top asset management firms and you'll receive a who's who in the investment world: Blackrock, Deutchebank, Vanguard Group, J.P. Morgan, Goldman Sachs, Legg Mason. Although Kasina is extremely confidential about which companies retain their services, the names are drawn from the top players in world investing. While focused predictive analytics affect every marketing and product development decision, Kasina is a boutique firm, intentionally small because their market is very niche.

In serving these clients, Kasina experiences the same sales management and CRM needs as every other company—including yours. What can Kasina's experience offer? For one thing, a company focused on research, trends and excellence is sure to be an example on how to do CRM well.

## Contact Management to true CRM

David wanted to take Kasina's contact management to true CRM: for their marketing efforts to be on the same platform as business development and customer service, in one seamless, integrated customer relationship management tool. "We wanted our CRM to fit Kasina's business process like a glove. While ACT! was a fine contact manager, it left our organization with information in silos that were hard to integrate."

David Barak is a strong driver of Kasina's CRM success. A bright guy with lots of experience, when David came to Kasina he immediately saw a glaring sales challenge: "Working out of New York and Boston, our sales staff were on the road all the time. Their primary tools were ACT! and a glorified Excel spreadsheet. Sometimes weeks would pass before a salesperson could connect and go through a full sync process. Both managers and field sales were missing huge amounts of real-time leads and sales information."

Worse, ACT! didn't really interact well with Kasina's email programs or their website. David tasked himself with considering alternatives offering true mobility to the sales staff and eliminating syncing issues. David fortunately was no stranger to the world of mobile software, and knew it was a solvable problem.

"We needed a cloud solution. All of our clients are on Salesforce.com," related David. "And I was very familiar with Salesforce from a previous job. We looked at lots of CRM solutions with cloud access—Microsoft Dynamics, of course, and SugarCRM. When I looked at SugarCRM, I could immediately tell where it was better than Salesforce and where it wasn't."



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But David had a bigger problem to solve than which software would work best. “I’d only been with Kasina for a couple of years. They’d been using the same system for over a decade, and there was tremendous internal resistance to changing from ACT!—even if it didn’t work as well as we needed. As someone new to the company, I didn’t have enough reputation and rapport to make sweeping changes.”

His solution? “I looked not just at software, but at the partners. The question I asked myself over and over was, ‘How is this partner going to help us make this a smooth transition?’

David simultaneously was working on redeveloping the Kasina website to interact with a CRM system, capturing marketing and client data. “We were also switching email, and needed something that could handle email campaigns. Out of the box, none of the software solutions could meet our needs. So once again, I wasn’t just evaluating platforms, I was evaluating their whole company. Could they handle custom work? Did they have experience in our business goals?”

Asked which came first, the software or the service provider, David answered, “W-Systems became an important player pretty early on. Our contact Chris Wettré was someone who didn’t seem as if he was pushing an agenda. He talked about how they’d helped clients migrate from ACT! to SugarCRM—in fact, W-Systems had worked with a whole lot of small companies doing that exact thing.”

The strategic plan that Kasina and W-Systems followed was twofold: first, they would slowly shift behaviors away from the popular existing program. Second, W-Systems was very good at positioning SugarCRM’s features not as ‘this great ability’ or ‘that great feature’, but as showing their benefit to Kasina’s sales team.

“For instance, syncing was a universal problem. Everybody dealt with it, and nobody liked it. W-Systems’s promise of eliminating syncing perked up their ears and they became more willing to listen. The second thing was having a reliable ability to access data. When our server went down, even in the office we might lose access to our CRM for two or three days. Having constant, reliable access quickly became important to everyone. A cloud server’s ability to have everything redundant and recovered immediately was an attractive internal selling point.”

David knew what the market offered and what he wanted for Kasina. “Cloud access was critical, but so was a mobile app for CRM. Sugar didn’t have a mobile app at the time, but we knew it was coming,” said David.

## Moving Forward

“Our first step was to have our existing system checked. W-Systems signed an NDA and took a look. Chris identified a number of things his team had already tackled and knew they would be able to do seamlessly. We agreed what custom work needed to be done and how much effort it would take. It was absolutely clear that they had done this with a number of other clients.”

And there was more that made W-Systems attractive as a solutions partner. “One of my biggest reactions to working with Chris was willing he was to work helping us switch systems and change cultures. Other software providers were treating us like a small boutique firm who weren’t going to generate a lot of money for them. W-Systems took the time to look at our data before they saw a dime.”

W-Systems created a custom development system so David Barak could see what his proposed SugarCRM system would look like. “W-Systems knew it had incorrect assumptions, but they worked with us to get it right. Additionally, there were some features of ACT! that we wanted to retain. W-Systems offered fixed-price services to reproduce them in SugarCRM via custom code additions. The fact that they took that time and that level of care seriously impressed me. No one else did anything like that.”

### Kasina’s Director of Marketing, David Barak explains.

“We offer a variety of specialized services to help our clients capitalize on cutting-edge trends. Social media trends evolve, so we target topics such as the effective use of digital campaigns. Asset management industry standards change, so we research industry standards, allowing our clients to can benchmark their performance against peers. An asset management company with an on-the-ground workforce talks with us about what their salespeople—in their industry, wholesalers—need to do when they visit a financial advisor; how often they should meet in person, how many financial advisors should each wholesaler cover. We help them to make data-driven decisions.

“And we offer predictive analytics: what is the potential future of the asset management industry? How can our clients position themselves to lead their market?”

## Sophisticated Marketing

David also liked that W-Systems would be able to tie marketing efforts into the CRM system. He'd launched a new website based on WordPress and wanted customer input from the website to be captured—and acted upon—in SugarCRM. A standard WordPress plug-in enabled forms entry capture, and David implemented a custom entry handler to do duplicate-record checking and create an action item for targeted sales staff.

Better than that, Kasina could capture exactly what interested our clients on the website or via email campaigns. "We offer research studies—40 or 50 pages, 12 to 15 times per year—to our audience. We also do monthly publications with several topical articles about cutting-edge industry information. When a client or prospect downloaded a research study, information about it goes directly into Sugar," related David. "We use Constant Contact for email campaigns, and wanted to continue due to its reliability as a delivery platform. It was integrated to SugarCRM using a Faye Business Systems-to-SugarCRM Constant Contact link."

W-Systems extended the Constant Contact integration so that SugarCRM could alert sales staff and schedule tasks for them. "They can see the click-through in our newsletter, so they can upgrade the critical status of a client based on their reading and their engagement with the message content. Our email campaigns can become more and more directed to the client's specific interests."

### Would Kasina work with W-Systems again?

David is emphatic. "Absolutely. Part of W-Systems's business development strategy is to do a lot up front. They're so responsive. With W-Systems's expertise, my one-person marketing department has been able to seamlessly create a seamless information system shared by marketing, business development and customer service. That was our goal. They never went over budget, and we accomplished everything on my list. Working with W-Systems goes so far beyond the typical experience."

## Seamless Outlook Integration

A final integration was integrating real-time Outlook email and calendar information to the CRM platform, even including the mobile phone app. Kasina used Riva CRM Integration Server to exchange data between SugarCRM and Kasina's Microsoft Exchange platform. Email sent and received flows directly into SugarCRM while sales users are travelling—and calendar updates happen immediately.

W-Systems made it easy for David to see sales activities with a custom dashboard package to capture key business relationship and forecasting metrics. "Once again, getting exactly what we wanted was a cost-effective option with W-Systems. We can see our sales goals compared to last year, and what percentage of our focused contacts meet with a salesperson each quarter. To do so with Salesforce.com would have required thousands of dollars every month. W-Systems's flat rate made it affordable to get the precise analytics we wanted."

With the time and money resources that Kasina had invested, David wanted to see if the custom code W-Systems had created would survive version releases. "W-Systems stood by their code and made sure it was delivered in an upgrade-safe manner. We survived each version upgrade."

As part of their upgrade to SugarCRM 6.7, Kasina deployed a state-of-the-art mobile CRM experience for their users—allowing for any CRM-related activity to be done on the mobile phone as efficiently as on an office desktop. "Sugar's 6.7 release offers a real mobile app that no traditional CRM has ever done right. Some of the small niche players have good mobile apps, but it was nice to see one of the bigger players like Sugar producing a really competent mobile app. I tested it before rolling it out to our sales team, and found myself not even going online. The mobile app is that good."

David went on to consider an even better future. "With the 7.0 release coming soon, Sugar will jump ahead of anything Salesforce.com offers."



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David Barak, Director of Marketing