

CASE STUDY:

# Paving the Way for Modern Adoption Processes

Gladney Center for Adoption Improves Client Experiences with Sugar.

 GLADNEY Center for Adoption

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adoptionsbygladney.com



Gladney Center for Adoption, Texas' leading adoption agency, has provided over 30,000 children with new homes. Gladney not only focuses on the adoption process, but supports birth mothers and adoptive families for their entire life through services such as education, advocacy, support programs, and counseling. Gladney integrated Sugar into its business practices and has used its flexibility to keep up with consumer expectations and technology.

## Business Challenges

Originally, Gladney's various departments had no transparency between divisions because each department had their own database. "If an adoptive parent moves, then six different employees in six different departments would have to update the address," said Ryan Doty, Application and Software Specialist at Gladney. "This was a huge inefficiency and increased chances for inaccurate data. On top of these issues, our main database was outdated and no longer supported." The customer service expectations were continually increasing and changing as their audience became more technologically advanced. These problems led Gladney to search for a unified database that would reduce time spent on data entry, automate processes, and improve the client experience.

## The Path to Success

Gladney contacted W-Systems for consulting and learned that Sugar was a flexible and open-source platform that would provide them with more options than any other database. Gladney evaluated industry-specific software and other CRM platforms, but each required additional pieces of connecting software to fit all of Gladney's requirements. "What really drove us to Sugar was the flexibility. Instead of us trying to mold to an off-the-shelf product, we could make the product mold to us," said Doty.

## Success Factors

### Data Entry Efficiency

In order to create a positive customer experience, Gladney communicates with many birth families via their preferred communication channel, text messaging. Previously, employees had to retype all these messages by hand to store them in the database. In order to save staff time, W-Systems built a custom SMS (Short Message Service, or text messaging) integration that automatically captures text message communications and stores them in the correlated Sugar records.

### Improved Client Support

W-Systems also built a client-facing portal that integrates directly with Sugar. It is known as "My Gladney" and is used by adoptive families and birth families to interact with Gladney. Using the portal, clients can access forms and training



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materials, complete paperwork, and pay fees. “We have had a very positive response from clients,” said Doty. “They no longer have to call in to pay with a credit card or complete forms by hand.” Through Sugar and the online portal, Gladney has been able to expand their online support services to a wider audience. Gladney is modernizing the adoption process in order to meet customer expectations and needs. “We strive to evolve with modern technology and consumer expectations. We are proud and honored to be a global leader in the field of adoption and we work very hard to ensure we are serving all our clients and providing efficient and compassionate client care”, said Doty.

#### Better Allocation of Budget and Time

Customizations to Gladney’s Sugar instance allowed them to better allocate resources such as time and budget. The customization that contributed to this the most was the document generator built by W-Systems. The adoption process requires heavy documentation, so prior to adopting Sugar, employees at Gladney manually filled out all documents, which were sometimes over 70 pages. “Now, Sugar collects all that information over the course of the process, and our staff can just click ‘Print Document’ and it automatically generates the PDF,” said Doty. “We are providing better client care and with more efficiencies. This means we are able to concentrate on serving our mission and less on paperwork.”

#### Powerful Reporting

Gladney invested in an additional integration between Sugar and a third-party reporting application called Informer. Informer is a self-service reporting and business intelligence tool that integrates with Sugar to create an even more powerful reporting system. The management team has been able to use these reports to determine where marketing dollars should be allocated. “We have been able to cut spending in certain areas and ensure that we are better able to serve our clients. That has been a savings for us in very important ways such as conserving staff resources and providing better client service,” said Doty.

#### Organizational Commitment

From the start, Gladney’s leadership team led by example and embraced the system, which has led to dedication across the company. Gladney also created an internal team with members from each department to ensure users were properly trained. This ensured that each department had a representative they could go to when they needed support. Gladney attributes their success to both organizational commitment and approaching the transition as a long-term project. “The staff is finally starting to see the wow factor of Sugar that really makes it beneficial to our organization. But, it was 1.5 years of partnering closely with W-Systems that made things go smoothly. After all, change can be difficult but with the right partners providing support and resources, a challenging situation can evolve into successful solutions and more opportunities”, explained Doty.



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Ryan Doty, IT Supervisor