

CASE STUDY:

# The Jung Center Furthers Mission with SugarCRM

How a Non-Profit Uses SugarCRM to Increase Course Registration.

THE **jung**CENTER

The Jung Center  
junghouston.org



For more than fifty years The Jung Center has been providing continuing education for the general public with an interest in mental health. With over twenty thousand current students and a growing international student base, The Jung Center utilizes Sugar as both its registration and member management system. By employing Sugar and a custom portal, The Jung Center has been able to further its mission to increase the availability of education through increased registration for online courses.

## Business Challenges

The Jung Center was facing several obstacles which led them to evaluate CRM options. Approach, their current member management system, was becoming obsolete and needed to be replaced. Additionally, their website wasn't linked to their database, which meant that their registrar division was processing course registrations manually. Sean Fitzpatrick, the Executive Director at The Jung Center, explained how tedious this previous process was. "We would print out the collective demographic and payment information and hand-key that into the database," said Fitzpatrick. "Then we manually hand processed the trans-action, hand typing each credit card number into the keypad." The data wasn't stored in a way that could be reported on, so they had no way to analyze their business results and improve upon them. Because they knew their current program didn't fit their needs, they decided to evaluate new member management systems.

## The Path to Success

After working with a consultant, The Jung Center determined that they would need a custom piece of software that would act as an all-in-one solution. They wanted to be able to manage member records and donations, create an online registration site

and an online store, process transactions, and create email lists. They wanted a solution that would help them do more with fewer resources.

The Jung Center wanted to work with Sugar because of its ability to be customized. After meeting with different partners, they selected Epi-com to create their Sugar instance. "We were deeply impressed with the way the W-Systems team assessed our business functions and quickly came to understand our range of needs and how Sugar could provide solutions for those needs," said Fitzpatrick. The Jung Center's all-in-one solution was implemented in phases to minimize the impact of change. Today, their instance is comprised of:

- A custom user portal which provides members a place to register for classes, access videos, order and pay for books and supplies, print certificates, and manage their course history
- A custom Order Wizard, which was built to make it easy for users to create orders that push into custom Sugar modules
- Shopping cart functionality that integrates with Authorize.net to make transactions seamless for customers and automatically creates records in a custom Orders module



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## Success Factors

### Reporting Capabilities

Going from manual to automatic data entry has decreased data entry errors and increased the organization's ability to report on data. Employees who were previously spending time on tedious data processing are now able to spend time on more meaningful work. "Because we began collecting more information, we were able to make finer distinctions about what kind of transactions we were taking, and what kind of interactions we were having with students," said Fitzpatrick. "So we were able to put that information into marketing, development, and budgeting to make better decisions about enrollment."

### Dedication to User Adoption

While the initial phase of implementation led to some employee push-back, The Jung Center quickly made some changes to address concerns and ensure user adoption would not plummet. They found that weekly CRM meetings and having an in-house CRM admin both had a positive effect on user adoption. "Both were created as a way for the team to get answers to their questions, from creating reports to data coding to streamlining processes," said Fitzpatrick.

### Cross Division Benefits

Because The Jung Center has been able to use Sugar across the company, the investment has benefited multiple divisions. While the registrar has used Sugar to automate processes, other departments are also using the system. "Bookkeeping depends on Sugar as an auditing system for accounting. It absolutely serves fund-raising because it is both our member and donor management tool. And it furthers curriculum development, as we use it to analyze our enrollment history and make decisions about what topics to offer," said Fitzpatrick. "The whole organization depends on the CRM. Our work is really improved by it."

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**Sean Fitzpatrick**, Executive Director

### Alignment with Mission

Because Sugar is highly adaptable, W-Systems was able to create customizations that enable The Jung Center to spend more time focusing on its mission and less time on tedious, manual efforts. "The biggest impact is that we can do more," said Fitzpatrick. Enhancing their website to have on-line registration has created a more robust online experience that is more in line with modern consumer expectations. "It surprisingly helped us develop online education," said Fitzpatrick. "People can now actually receive video content on our website, and it's powered by Sugar."

### Flexible Partnership

Both W-Systems and The Jung Center approached the project with flexibility. The Jung Center believes this was a key to the success of the project. "If you're doing a custom software build, you have to expect that there are going to be roadblocks. The plan that's laid out at the beginning is not necessarily where you will end up," said Fitzpatrick. "But at every one of our pain points, W-Systems listened, was responsive, and very flexible. They were able to think in very new and creative directions."

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