

CASE STUDY:

# Architecting the Perfect CRM Platform

How Bjarke Ingels Group Designed Sugar to Meet BIG Requirements

The logo for Bjarke Ingels Group (BIG) consists of the letters 'BIG' in a bold, black, sans-serif font. The letters are stylized, with the 'I' being a simple vertical bar and the 'G' having a thick, blocky appearance.

Bjarke Ingels Group  
big.dk



Bjarke Ingels Group, referred to as BIG, is a renowned Copenhagen, New York and London-based group of architects, designers, and builders operating within the fields of architecture, urbanism, research, and development. The company is currently involved in high profile projects throughout Europe, North America, Asia, and the Middle East.

BIG recently completed VIA 57 West, an iconic pyramid-shaped tower block or "tetrahedron" residential building that rises 467 ft. and 44 stories tall, located on West 57th Street in the Hell's Kitchen neighborhood of New York City. Other projects under construction include Two World Trade Center in NYC, LEGO House in Denmark, along with the Washington Redskins Stadium, and the Smithsonian in Washington, D.C.

BIG came to us in search of a CRM solution, primarily to track their potential architecture project opportunity pipeline.

## The Problem - No Common Source of Information

The team at BIG saw a need for a better way to manage their contacts and had a desire to integrate them into their general business development workflow. BIG was, and is, still growing at an alarmingly fast rate and management decided that while they were still able to manage their workflows and data, it was vital to centralize it, creating a singular place where users could access all the information. They recognized that if they waited, it could later take double the time and money to make the change.

For most of its existence, BIG relied on Microsoft Outlook and Excel for contact management, with no central database to hold all their information. This lack of a central database became a burden, as users often had difficulty finding and reporting on data in a timely fashion. They needed a seamless database for contacts, projects and potential projects. Clearly, a proper CRM solution was in order.

## The Challenge - Retrofitting Workflows

Before implementing Sugar, BIG had tried to use a different CRM marketed towards the architecture and engineering industries. That system ended up not working out so well. BIG had several custom configuration requests, which the other CRM was unable to accommodate. BIG also needed something that integrated well with Outlook. Unfortunately, BIG had to abandon the full implementation of this other CRM as they



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could see that it would not be useful for what they wanted to accomplish. So, in less than a year, they were back on the hunt for a CRM solution that would meet their unique needs.

"BIG was coming out of a failed implementation, so there wasn't a lot of trust in the vendor relationship," said Dennis Smith, VP of Sales at W-Systems. "Once you've dealt with someone that has told you all the great things they can do, and then they can't do them, a new vendor is immediately cast under that shadow of doubt from day one."

"There was a general feeling of weariness around the subject," Arielle Cruz, BIG's Business Development Coordinator confirmed.

As an architectural firm, the BIG team consists of many highly visual people. They are designers by nature, visual learners, and communicators, inspired by the visually stunning. W-Systems needed to make their CRM system highly functional as well as visually and graphically appealing.

## The Solution - Redrawing the Blueprints

After selecting Sugar as their CRM solution and W-Systems as their implementation specialist, BIG worked very closely with W-Systems to best plan utilization of Sugar and develop the business customizations they needed.

## The Customizations - Building to Code

Before Sugar, BIG's employees had been entering contacts into Outlook and assigning them various categories. They also utilized the notes section within the contact screen in Outlook. It was important for them to keep as many of their current workflows as they could while switching over to Sugar. W-Systems arranged for all the Outlook information to synchronize to Sugar, including the Contact and Task color codes.

The business development team kept a complex color-coded spreadsheet used to establish the status and type of potential projects. W-Systems added a color status customization to Sugar, so they could continue to use the same color indicators to determine project status.



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W-Systems also created user reports with BIG's visual culture in mind, customizing Sugar to ensure color selection consistency across different reports, dashboard charts and color indicators. If Green means Project Awarded on a color indicator, it would also be the color used to represent this result on every chart and dashboard element in the system. W-Systems mirrored in Sugar each Excel spreadsheet chart and report previously used, which greatly eased user adoption.

"W-Systems demonstrated to BIG that the Sugar platform could accommodate any unique business need such as color coding and custom reports that made information appear to practically jump off the page," said Dennis Smith.

BIG is an international organization. Therefore, they have a lot of contacts that use foreign characters in their contact data. Sugar is one of the few CRMs able to handle such international character sets very well. Sugar allows users of all nationalities to use Sugar in their own language context.

Having spent the most time managing the Sugar project and learning to the tool, Arielle Cruz realized that she needed to plan for user adoption. She created a handbook of internal guidelines and best practices for using Sugar the BIG way. She maintains a library of learning resources available to all users of the system including an easy to follow video tutorial for new users produced by W-Systems.



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## The Results - Cutting the Ribbon

Today, BIG is using Sugar to organize their information so that it is more accurate and accessible. They use Sugar to manage a multi-country pipeline and business development activities. The marketing, business development, press and front office teams are satisfied that they ended up with a CRM tool that fulfilled their original vision.

"We love the way contacts and relationships are comprehensively linked. We can identify people that are working on a project as well as what their role is on the project,

which is super important to us," said Arielle Cruz. Also, "I think about the amount of time that our business development team spends entering data into the system and how often we generate reports using this data or simply refer back to it. Because everything is centralized now, we know where to find the information we're looking for, and our work process is much faster, reliable, and more efficient."

Arielle continues, "When putting together our marketing materials, it's been such an improvement to be able to gather general project information such as size, location, and program so quickly. Without Sugar, we would end up either contacting colleagues for additional details or shuffling through several folders and emails, which took up a lot of our time."

## The Key to Success - Project Management and Application Expertise

"I see the benefit in hiring an outside consultancy like W-Systems for CRM implementation," said Arielle Cruz. "When Ken Clark from W-Systems stepped in as vendor project manager, he took the time to understand what our business objectives were and was able to communicate these to the W-Systems developer team. Having Ken and W-Systems manage the project was crucial for us."

The process was a two-way street. Ken Clark was also able to explain how to best use the Sugar system. It helped Arielle rethink some of the custom items her team was requesting, and make suggestions about how they could better create a more efficient system consistent with their workflow.



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**Arielle Cruz**, Business Development Coordinator, BIG

## The Future - Building on Success

There is still room for expanded use of the Sugar platform. For instance, BIG also participates in events such as exhibitions and lectures. BIG is planning to create new functionality in Sugar to help track these efforts. Arielle also wants to expand the reports and dashboard usage. "With the team onboard and comfortable using the system, having this centralized database creates opportunities for us to run analyses that may reveal more about our business development workflow that we hadn't considered before."



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At the end of the day, it was a success for all involved. "I have a friend who works at another New York-based architecture firm, and I've already introduced her to W-Systems and Sugar," said Arielle Cruz.

BIG's Partner and Head of Business Development, Kai-Uwe Bergmann said, "W-Systems's attention to detail and being able to listen to our needs and then implement them into our tailored CRM system will ensure that BIG is able to respond to any future possibility. For that I wish to thank them on behalf of all BIGsters."



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**Kai-Uwe Bergmann**, Partner and Head of Business Development