

CASE STUDY:

Leveraging Sugar to Build on Strategic Sales Initiatives

Building Materials Manufacturer Implements CRM to Support Sales Reps Both Internally and Externally



American Specialties, Inc.
americanspecialties.com



American Specialties, Inc. (ASI), is a privately held company with roughly 1,000 employees worldwide. ASI designs, engineers and manufactures fully-integrated washroom accessories, partitions, and lockers for the construction industry. The company's washroom accessories, hand dryers, bathroom partitions and storage systems can be found in some of the world's most prestigious airports, stadiums, universities, schools and other commercial buildings.

As a fast-growing organization, ASI needed a better way to manage the many opportunities coming their way. "When I joined ASI group two and half years ago, as part of my interview questions, I asked, 'what CRM are we using?' and the short answer was we had different systems being used in different parts of the company," says Avi Bar, National Sales Manager, American Specialties, Inc. Knowing the power of CRM firsthand, he made it his mission to change that. The proposal to develop and adopt a CRM was supported and fueled by Dennis Jackson, VP Sales & Marketing as well as other key executives within the organization.

Let the Bidding Wars Begin

The need for a CRM was well documented at the ASI Group. The Canadian team had their own mini-CRM and were ahead of their time, while the Australian team had started down the path of their own CRM. The concept wasn't new but it needed to be galvanized and centralized. Avi was selected to lead the charge in presenting various options and solutions to the ASI management team, given his past experience with CRM platforms. Dennis, tasked the team with evaluating several platforms, including Salesforce, Oracle, Microsoft, and Sugar. "Microsoft deeply disappointed us because they didn't return our phone call, so I figured, if they can't even use their own CRM to manage their potential sales, why should we use their CRM?" Avi expressed with frustration. "Since we didn't use Oracle's ERP, we didn't feel there was enough of a value proposition to go with Oracle's CRM, and their pricing wasn't that competitive. We also didn't know what their limitations were and we didn't feel comfortable with their ability to customize the product to our needs."

In the end, it came down to Salesforce vs. Sugar. "Sugar's versatility, its open source, its ease of customization, and its cost structure were hard to beat. I also think Sugar, being a smaller, underdog company is far more willing to work with you and to listen to your feature requests. I had familiarity with both Sugar and Salesforce, but I just felt that overall, Sugar was the better product," says Avi.

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Bringing in Third-Party Manufacturer Representatives and Influencers

ASI's use case is particularly interesting, in that they have a mix of employees, managers and an outside sales team using Sugar CRM in nearly everything they do. About 85% of ASI's CRM users in the US are not employed by ASI, but are independent, third-party manufacturer representatives. However, they are very much a part of their sales team, as non-employee partners using their CRM in a very strategic and comprehensive way.

Currently, ASI is utilizing Sugar for account management and strategic sales initiatives, including targeting industry influencers. Interestingly, most of the people ASI targets, don't buy their products, they simply influence the specifications, and that translates into a purchase order.

In ASI's industry, architects and building owners design and build buildings and then sub-contractors ultimately must buy the building supplies from manufacturers who comply with their specifications. "Our ability to influence those specifications directly relates to our ability to sell our product. But the people we spend a lot of time with – architects and end users – are not actual buyers and will never be buyers of our products," says Avi.

Another challenge facing ASI is an extremely long and complex sale cycle. Just think about how long it takes to build a building from concept to construction. "The average sales cycle for us is anywhere between three to seven years," says Avi. "In that amount of time, anything could happen at any point and so managing the project, not just the account is the complexity." Because of this, ASI is both account centric and opportunity centric, performing a healthy mix of project management and/or opportunity management and account management to keep these lengthy projects on track.

Connecting to Other Business Systems

ASI needed some major integration in Sugar, including ERP and Construction Data Services which has a very large database of virtually every architect, general building owner, general contractor and project that is being undertaken throughout the US. "We are tapping into that data and integrating it into the CRM and measuring our ability to influence specifications," says Avi. The challenge was integrating the data from these various platforms into one centralized system.



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Getting Up to Code: Customizing Sugar

ASI uses wDocs, a document automation customization developed by W-Systems for their monthly reports, trip reports, how they communicate with their sales reps and more. The wDocs tool automatically generates the required reports and documents using any information in Sugar.

ASI further created a small customization, that turned out to be meaningful, to enable the user when scheduling a meeting to check a box and add action items which will automatically create a series of tasks from within the meeting. Previously, after a meeting, you'd have to go out and create a task as a separate module. Unfortunately, salespeople, who are invariably busy, simply wouldn't do it because it was one extra step. By incorporating note creations within the meeting itself, now there is a new box that says, 'hey, here are the action items that came from this meeting, what's the due date?' and it creates the task and populates your task list. "That is a small customization that has had a big impact on the way our sales team functions," says Avi. Another key feature that was highly applauded by the sales team is the ability to dictate notes directly into Sugar from a mobile phone.

ASI did some additional customizations, including a quote follow-up process. "I firmly believe in feedback loops, so if you ask somebody to do something, show them what the net result of it is and make sure that it drives the continued positive behavior, Avi explains. "We created quote follow-up modules and dashboards that show the quotes you need to follow up on, and once you have followed up, these are the results of the follow ups and these are the next steps on what needs to happen after the follow ups."

Measuring Up

Leveraging Sugar, ASI has developed some unique algorithms to grab huge masses of data to help focus on driving their KPIs. "We have done some very interesting backend algorithms and analytics to drive and optimize how and where we spend our time because, at the end of the day, it's the most valuable resource we have and using a salesperson's time effectively is one of the most challenging things," says Dennis Jackson.

Before using Sugar, ASI's team was far less efficient. "Being focused, disciplined and systematic in our approach is really important, as is having good KPI measurements to drive sales. Salespeople are easily distracted, we need to have something that keeps us focused and keeps our attention on our strategic goals, this is very difficult to do in the absence of being able to track it, manage it and report on it. Sugar has helped us coalesce our sales strategy and manage the execution of it and then report on its respective successes and failures," Avi explains.



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A Grand Unveiling

Support for the CRM came from the top and the bottom of the organization. The ownership and senior management group believe this is the right path for ASI, while the sales organization realizes this is a tool to help them succeed. “The user acceptance rate at ASI has been very high, that’s the absolute best indication of a successful CRM implementation. A particular victory has been the acceptance from the third-party representatives,” says Ken Clark, CRM Implementation Manager, W-Systems,

“Sugar has changed the way we work, fundamentally,” says Avi. In the past, if ASI’s reps wanted to collate all their sales information on a customer from ASI’s various business units, they would have to go and write a few reports and customize the reports every single time, now they just find the customer and run a pre-set report that generates their customer data into a PDF in a matter of seconds. They can now show it to the customer and have a meaningful, insight-driven conversation while achieving massive productivity improvements. “The time savings are difficult to measure because the truth of the matter is many people just wouldn’t do these reports before because they were so difficult,” Dennis explains. “Sugar has changed the way we work, fundamentally,” says Avi. In the past, if ASI’s reps wanted to collate all their sales information on a customer from ASI’s various business units, they would have to go and write a few reports and customize the reports every single time, now they just find the customer and run a pre-set report that generates their customer data into a PDF in a matter of seconds. They can now show it to the customer and have a meaningful, insight-driven conversation while achieving massive productivity improvements. “The time savings are difficult to measure because the truth of the matter is many people just wouldn’t do these reports before because they were so difficult,” Dennis explains.



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Looking Toward Phase II and Beyond

“We have a fairly extensive road map planned for additional use cases for Sugar in the future, as we are currently only using a fraction of its capabilities,” says Avi. ASI’s next major project will likely be marketing integration. “Today, we purely utilize Sugar for sales, but very soon we are going to bring together and strengthen the relationship between our sales and marketing teams. Ultimately, we’ll also bring customer service into the fold as well. We have a five-year road map in place, so it’s a big and ever-evolving project for us.”

ASI’s rate of growth is on a very good trajectory. How much of that is associated with Sugar’s implementation? “I think at this point, it’s way too early to tell. However, I have complete faith that Sugar and W-Systems will take our successful growth curve and only accelerate it,” says Avi.

Sharing in the Glory

Historically, Avi has implemented Sugar on his own with an internal team. However, this time, he trusted W-Systems to take the lead. “I found W-Systems to be very professional, but most importantly, very accountable,” says Avi. “It’s almost impossible to have everything go the way you anticipate it will go, but what you can hope for is that your partner on the project can understand what you are trying to achieve, which I think W-Systems did a great job at. Also, when things don’t go your way, you want a partner that is accountable and responds appropriately, and W-Systems has been nothing short of brilliant in that respect. If they say that they are going to get something done, they are going to own it and they are going to get it done, they are going to keep to their promise, things happen, but being accountable for it is really what matters.”

According to ASI, W-Systems also brought a lot of expertise to the table, guiding ASI’s best practices for CRM implementation. “Truthfully, the wDocs component, as well as wMaps were helpful use cases and features that we would otherwise not have paid to get developed just for us, yet it proved extremely valuable,” says Avi. “There was value that came beyond the work that they did directly for us, but through the add-ons they have been developing over the years for multiple customers that have enhanced our Sugar experience.”



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