

CASE STUDY:

Viawest Scales for Business Expansion with Customized CRM Solution

How ViaWest Used Sugar to Fulfill Orders and Automate Order Processing.



Viawest
viawest.com



With a highly integrated CRM system based on SugarCRM, Viawest and W-Systems have built a platform for business expansion. Sales quotes are generated quickly and easily and all aspects of the sales process, from lead generation through contract document preparation and order entry are automatic, quick, and accurate.

Here's How They Did It

Viawest — the premier managed hosting provider in the western United States — faced a period of rapid growth fueled by market demand and frequent acquisitions. With expansion into new territories and a rapidly growing base of customers, demands on sales representatives continued to increase. Reps needed a new set of tools to meet these demands and Viawest turned to W-Systems for a solution.

The Path to Success

Based on priorities set by Viawest, W-Systems focused on migrating and cleaning-up old customer and prospect data from Viawest's legacy CRM system. Once that was done and users were comfortable with the new system, W-Systems shifted gears and began automating other key sales processes. Many important objectives were achieved, including:

- Quicker and better price quotes with a specialized quote module that speeds the configuration and pricing of customer quotes.
- Faster and more accurate order processing with an integration between SugarCRM and Viawest's back-end order management system that facilitated automatic order entry.



“SugarCRM and our partner W-Systems have helped us grow as a business. We're able to standardize our quotes and contracts to deliver a consistent message to our customers.”

Tyler Masters, Director of Information Systems

- More accurate price quotes and simpler pricing administration with a custom product catalog built in SugarCRM that can be easily and quickly administered from headquarters.
- Better sales forecasts and in-depth knowledge about active sales opportunities with a custom reporting and dashboard system that tracks changes in deal status through time.

W-Systems continues to work with Viawest to improve their CRM system as their business grows and changes. Using a phased development approach, tight business requirements, and careful technical feasibility analysis, Viawest has become a model for effective CRM deployment.



Learn more at www.w-systems.com

Success Factors

Rock-Solid Requirements

Viawest has a team of professional business analysts who are experts at uncovering user needs. The requirements documents that Viawest generates make budgeting, scheduling, and development much easier and as a result projects meet customer needs on time and on budget.

Rigorous Testing Process

Viawest is very involved in the enhancements being made to their CRM system. Before new features are released to users, Viawest tests everything thoroughly.

A Focus on the User

Viawest approaches CRM enhancement projects from the perspective of the user of the system. First and foremost they see their CRM system as a tool for making employees more efficient. Because they take this approach, user adoption is seldom a problem and user training is greatly simplified.

A Phased Approach

Viawest does not try to bite off more than it can chew. Experience has taught both Viawest and W-Systems that a phased approach to system deployment is best for all but the smallest systems. Viawest keeps a prioritized list of planned CRM system enhancements and they don't roll out new capabilities until the organization is ready to absorb them and use them effectively.

Would you like to see how a properly constructed CRM system can make a critical difference in sales growth? Contact W-Systems and we'll show you how.