

Replace SALESFORCE.COM with SUGARCRM

workMETHODS
FASTER, BETTER, SMARTER BUSINESS PERFORMANCE

Challenge

Our client, a leading collaboration services company, had a sales team of 250 professionals. In order to manage the sales, the client had leased SALESFORCE.COM sales automation application. The client was spending $250K/year for the application.

However, the application lacked flexibility. The application cannot be easily customized. The data resided with SALESFORCE.COM and hence reporting was limited. Moreover, the adoption was low. This resulted in inaccurate information within the application. Management could perceive the value of a CRM application was not seeing the results.

Our Solution

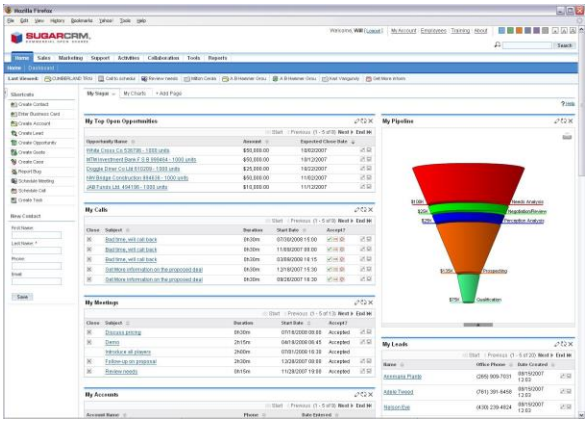
Our professionals analyzed the challenges as well as available technologies and suggested an open source Customer Relationship Management solution.

Sugar is affordable and easy to use business CRM, designed to help your business communicate with prospects, share sales information, close deals and keep customers happy. Thousands of successful companies use Sugar everyday to manage sales, marketing and support.

workMETHODS customized and braded SugarCRM for the client. workMETHODS migrated data from SALESFORCE.COM using API. Moreover, workMETHODS added new modules to suite the sales process and manage sales collateral within the tool. The solution was hosted on workMETHODS servers. We supported and managed the solution for 3 years until the client's IT department was ready to take over the support.

The key features of the solutions were:

- Sales Force Automation - Allow sales representative to track and share contacts and opportunities, manage and upsell into existing accounts, forecast revenue, monitor performance through dashboards, manage quotes and contracts, work offline through our sugar mobile and collaborate through integration with Microsoft Outlook
- Marketing Automation - Create, execute and track campaigns across multiple channels with the campaign wizard. Develop compelling email marketing programs and capture leads directly into your CRM system with web-to-lead forms.
- Support - Centralizing customer service requests across channels to allow companies to manage inbound emails, diagnose bugs, share knowledge, and resolve customer issues





Key Benefits

Save $200K/year

SugarCRM is an open source solution. This saved the client licensing cost.

Enhanced Reporting

With a hosted model, the CRM data was readily available to build custom reports as well as download to Excel.

Reduced Marketing Costs

SALESFORCE.COM licensing did not include Marketing automation. However, the client got Marketing automation modules for no additional cost and hence could manage marketing campaign better.

Improved ROI

Flexibility, Enhanced Reporting, Additional Functionality, Synchronization with Outlook, Collaboration features, etc. improved the adaption and data accuracy and completeness within the CRM solution. Additionally, the application cost was significantly reduced.

Key Technologies

SugarCRM
PHP and MYSQL
Crystal Reports

Why workMETHODS

We cut your project costs by 40%!

workMETHODS is a global software and consulting services company. With right blend of people, processes and products, we have delivered results to several Fortune 500 as well as start-ups.

Our client relationships are driven by shared values and goals and not by rigid, locked-in contracts that limit your flexibility. We act as your partner and recommend the best solution for you.

10846 Welbury Court,
Reston, VA 20194

www.workmethods.com
sales@workmethods.com

(O) 703-889-8339 x 100
(F) 703-935-8345