



Company Profile

Headquarters

Norfolk, VA

Founded

1991

Company Description

Marketing and
Telecommunications Provider

Website

www.affinity4.com

Solution

Sugar Professional

Affinity4

A multiservice provider selects Sugar Professional as a platform to consolidate its multiple product and services offerings onto a single platform.

The differences between B2C and B2B-driven CRM initiatives are well documented. But for Affinity4, tracking the customer lifecycle across a B2C2B model required something a little more out-of-the-box.

The multi-service provider donates 10 percent of its proceeds to the charity or ministry of each customer's choice, which has resulted in more than \$75 million in donations to approximately 60,000 different organizations worldwide. But while this philanthropic model generates millions for a good cause, it also results in a multi-touch point, multi-department CRM initiative that requires a system capable of tracking it.

Saddled by in-house, .NET-era applications that were departmentalized and siloed, Affinity4 went to market a year ago in search of a new system capable of being molded to fit its particular business processes, and found the answer in SugarCRM.

A Diversified CRM Solution for a Diversified Product Portfolio

Originally just a long-distance service provider, Affinity4 has diversified its product portfolio in recent years to stay competitive, including the addition of Internet, wireless phone service, and DIRECTTV to its products and services. But with each product came a new custom-built system to manage billing, communications, emails, and more, says Jeremy McGee, Director of Information Technology at Affinity4.

"From an IT perspective, it was leading to siloed systems that needed to be consolidated as our customer-facing employees began to find product overlap across customers," he says. "Add to that the fact that 10 percent of the proceeds have to be donated to the charity or ministry of the customer's choice."

With their business requirements pushing the company towards a software package that could be developed into "a hub," SugarCRM Professional Edition On-Site was evaluated and selected in the spring of 2008, with the initial rollout starting the end of last year and being completed in May of 2009.

Sugar as a Platform

To build out Sugar Professional's capabilities, integrations were made with the company's ERP solution for invoicing, payments, and billing, and with the call center's Asterisk-based phone system for the customer service representatives (CSRs).

The customizations were extensive, and included the addition of nearly 30 custom modules and adding fields to the user interface for specific data sets. The majority of this work was accomplished via 6 developers kept in-house. "I don't know how many lines of codes we wrote, but it was a lot," McGee says. "We have everything from tracking invoices, payments, and credit card info in Sugar to integration with our Asterisk system, which

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Other custom functionality also include what employees at Affinity4 call the “Send Me Something” module, which enables CSRs viewing an account view to access a drop down list with a predetermined set of marketing materials, such as an email or print piece. If a lead shows interest in a product, the CSR hits the drop down menu, clicks on the desired marketing medium, and sends a personalized message that’s auto populated by Sugar based on the previous interaction.

Along the same lines, the company also developed a module to support its 1-800 marketing initiative. “The way we determine if our marketing campaign is successful or not is with predefined 1-800 numbers,” McGee says. “We’ve integrated that into Sugar via a module that contains that information and automatically associates those numbers with different campaigns and products. It’s integrated with our phone system so we have real-time info on what 1-800 numbers they’re calling, what products they’re purchasing, etc.”

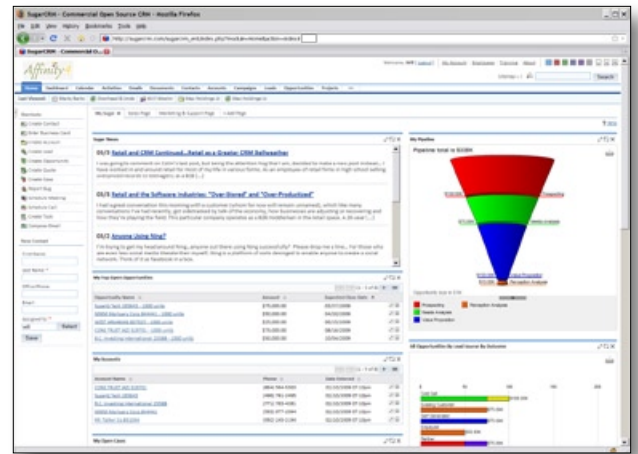
The Results

The implementation now stands at 50 users, with approximately 25 CSRs operating the system within the call center and another 25 across marketing, product management, and accounting. “We manage everything from our products, marketing, sales, billing, invoices, marketing, customer service, and our charitable proceeds all through Professional Edition.” McGee says. “Sugar has become the hub.”

Despite the level of customizations and work required to achieve this success, McGee is confident that open source was the most cost effective route to take. “We wanted to customize to our hearts content. One of the lessons we’ve learned is that going forward, the costs associated with maintaining a proprietary system that’s been heavily customized is too expensive,” he says. “That’s what led us down the path with Sugar; its provided us with a fantastic commercially supported framework to build on.”

About Affinity4

Affinity4 is an affinity-based marketing company whose mission is to help support its non-profits’ goals by assisting in their fundraising and development programs. Specifically, Affinity4 markets various telecommunications products and services, including long distance and digital phone services, high speed Internet, as well as DIRECTV®



and credit card to the supporters of its international base of non-profits which includes charities, ministries, colleges and universities. With each supporter’s purchase, Affinity4 provides a 10% GiveBack to the corresponding non-profit organization. Affinity4’s business model is to leverage and transform ordinary activities such as making phone calls into fundraising opportunities on behalf of vital causes worldwide. The Affinity4 Brand Promise is Ordinary Activities. Extraordinary Giving. To date, Affinity4 has given back more than \$75 million to non-profits worldwide. The company is headquartered in Norfolk, Virginia and led by President and CEO, Stephen Halliday. For more information, visit: www.affinity4.com or call 1-800-800-7550.

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