



## E3 Technology

A security consulting firm marries sales and project management with Sugar Professional™

### Company Profile

#### Headquarters

Spokane, WA

#### Founded

2001

### Company Description

E3 provides world-class security solutions to a wide variety of financial, healthcare, government, and corporate clientele.

### Customers

More than 100 in various industries

### Website

www.e3tech.net

### Solution

Sugar Professional On-Demand

E3 Technology, Inc., based in Spokane, WA, is a firm on the go. E3 delivers security solutions and other security-based technology services to organizations of all types. The consultants at E3 are always on the go. Therefore, the previous Act! databases that E3 was using to manage contacts were simply not enough to handle the needs of the business. Data was locked on individuals' laptops, denying management any visibility into sales and project performance.

Couple this with that fact that E3 is a virtual organization with associates working remotely in addition to the hectic travel – and it was clear a more robust and centralized solution was needed. “It was a big issue for us being a virtual office,” says sales manager Mike Leach. “We try to keep costs low and move that cost savings on to our customers to remain competitive.”

### Getting on the Same Page with Sugar Professional On-Demand

E3 evaluated several CRM solutions as it looked to migrate from the several silos of information locked on employee laptops. The key criteria in selecting a CRM system were flexibility and web access, something Sugar On-Demand offered for E3.

“Sugar simply fit what we were trying to accomplish in terms of flexibility and being a web-based application,” says Leach.

E3 began by migrating its data stored in Act! into a centralized deployment of SugarCRM's open source Community Edition, as a trial run. After Sugar proved to be the right web-based solution for E3, the company quickly upgraded to Sugar Professional On-Demand. The final deployment of Sugar professional only took a few days to complete, according to Leach.

### Making Sugar Fit the E3 Business

While E3 initially rolled out Sugar in a very “out of the box” format, the company quickly made some simple customizations to better align Sugar functionality with E3's unique practices. In the Opportunities module, E3 quickly customized the sales stages to fit its business sales cycles, providing a more relevant and predictable sales pipeline for the company.

In addition, E3 is also using Sugar's Project management tools to better align its services teams. By connecting sales operations to the actual projects and consulting services E3 provides, the company can allocate human resources more efficiently, Leach noted.

### A Big Boost in Sales

Leach says that one of the greatest benefits to deploying Sugar is simply the fact that E3's on the go consultants can access the application anytime, anywhere. Also, the web-based nature of Sugar Professional On-Demand means that E3 does not have to take time to install any software on its employees' computers, nor does E3 have to maintain any of that software. All maintenance is handled through the On-Demand subscription agreement, which

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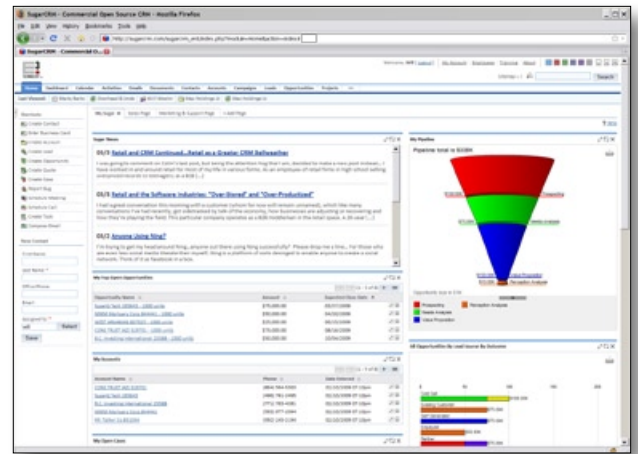


makes life easier for E3s administrators, but also allows E3 to concentrate on optimizing its core business, not managing software.

And while the peace of mind achieved thanks to the no-maintenance On-Demand model are a welcome benefit, strong productivity gains are also a very welcomed advantage. "We expect to see a 20% increase in sales thanks to deploying Sugar," Leach says. He notes this is due to the fact that Sugar offers more robust CRM, not simple contact management, allowing E3 to optimize opportunities and projects in ways it could not with its previous system.

### About E3 Technology Inc.

The E3 Technology team fulfills many different security needs. Team members teach seminars on security defense and countermeasures to help technical professionals better understand information and network security. Our team works with examiners to help our clients meet regulatory compliance requirements. We continue to seek out and familiarize ourselves with the most cutting edge security software available so that we can keep our clients' security needs cutting edge as well. The E3 team strives to build strong relationships with our clients and takes pride in knowing we are helping them secure their networks.



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