



Company Profile

Headquarters
Calgary, Canada

Founded
2001

Number of Customers
20,000+

Company Description
Provides computer services and technical support to customers across western Canada

Company Fact
Named as one of the fastest growing companies in Canada by Profit Magazine

Company Web Site
www.geeksontheway.com

Geeks On The Way

Taking Open Source to the Limit

Geeks On The Way know technology. The company provides various levels of technical support to residents and business all over Western Canada. So, when the company looked to meet its growing demand for its services with a CRM system, not just any system would do. With such strong technology expertise, the company knew it wanted a system that it could customize to fit its unique business process as well as grow with the system.

“We had already outgrown two previous customer management systems,” says Geeks On The Way CEO John Leishman. “So, we needed a flexible system that could grow with our business and really scale.”

Geeks On The Way was attracted to SugarCRM for various reasons. Since the company had already built out a telephony system on top of an open source phone system called Asterisk, Geeks On The Way figured that it should look towards open source CRM for its client management needs. “SugarCRM simply had the largest following, the most downloads and provided the most security from a longevity of product development standpoint,” Leishman notes, adding that his company felt that the standards-based and open architecture of SugarCRM would complement the Asterisk implementation well.

Sugar-CTI

Geeks On The Way handles hundreds of client calls per day. It was important that a CRM system be put in place that could handle a large volume of data entry and also enable efficiencies in the scheduling of onsite and online technical support. The first task for Geeks On The Way after deploying SugarCRM was to integrate it with its Asterisk system, the popular open source telephony package. SugarCRM being a very open system allowed Geeks On The Way to

perform deep integrations at the data and application level, according to Leishman.

With the integrated system, callers are recognized by their phone number or other identifiers, and their customer record in Sugar pops up on the agent’s screen as he or she answers the call. If a new client is calling, a “new contact” screen pops up to the agent and a tight integration with an external database of address and postal information populates most of the new contact record. This allows agents to process existing customers quickly, and also spend less time adding new customers in to the system. And since customers are well tracked using unique identification numbers, there is less duplication of customer records.

Intelligent Routing

Since Geeks On The Way is all about providing prompt, reliable service, it integrated Sugar with some back end databases to create efficiencies inside its service delivery model. Geeks On The Way has customized the Meetings module in Sugar to integrate with a system that analyzes the service calls slated for the day, and re-routes different agents to those call locations based on the most efficient route and schedule generated by analyzing the data in Sugar and location and mapping data. “This not only allows less technicians to handle more calls, but also cuts costs since there is ideally less driving done by technicians,” Leishman notes.

“With SugarCRM, we have reduced call handling times from two to three minutes down to as little as 20 seconds.”

John Leishman
CEO, Geeks On The Way



Sales Compensation

A deep integration to the accounting system has also provided strong returns for Geeks On The Way. Since so much activity and data is tracked and captured in Sugar, Geeks On The Way can simply run that data into its accounting system and more efficiently compensate its employees, which range from phone agents to contractors to field technicians. "Accounting used to take us a full 24 hours every pay period," Leishman notes, "But now it takes five minutes with our Sugar integration to our accounting system."

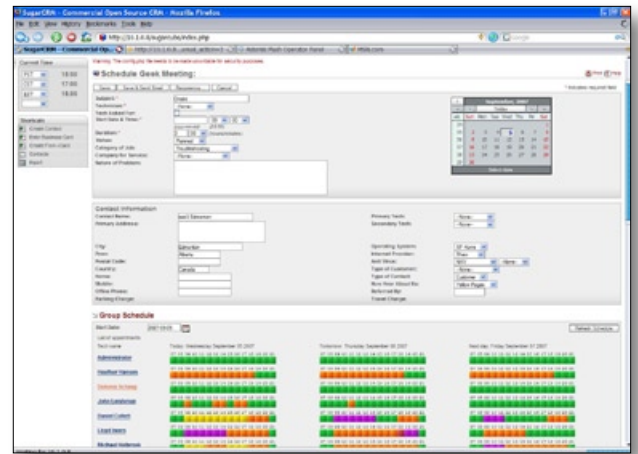
Field Service Automation

Again, Geeks On The Way knew it needed a highly flexible CRM system in order to really automate its existing business process from end-to-end. SugarCRM's open source nature proved a major asset, since Geeks On The Way have performed major customizations on the core product over the years.

One major customization of the system allows geeks on the Way to better equip its field technicians with critical customer data. Once a service call is scheduled in the Sugar system and routed to a field technician, agents can simply press a single button and all the pertinent information about that service case are emailed to the technician's phone. Previously, the agent scheduling that call would have had to manually cut and paste all of that data into an email and then send it to the field technician. "In a high volume business such as Geeks On The Way, saving those several steps adds up in the long run," Leishman says.

Lead Source Tracking

Not all of Geeks On The Way's customizations are done to speed up the performance of agents and technicians; some customizations are more strategic from a business perspective. For example, Geeks On The Way has created a custom workflow that automatically populates account records with data regarding how that customer came into contact with the company. So, if a customer found the company via a Google keyword search, via a direct mail promotion, or through a certified partner—that data is added to the record. And when the company reviews its closed business, it can better optimize its mar-



keting spend as well as instantly and more accurately compensate partners.

Improving Call Handling

Since it deployed Sugar, the company says it has seen lower marketing costs and improved customer support times. "With SugarCRM, we have reduced call handling times from two to three minutes down to as little as 20 seconds," says Leishman. And the company says simply knowing who an agent is talking to through its integrated system fosters closer relationships with customers and increases satisfaction levels.

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CEO, Geeks On The Way

Geeks on the way to the bank...

But Sugar's ability to scale to thousands of users will prove the greatest benefit as Geeks On The Way expands operations. Geeks On The Way is looking to grow about 10 times its current size in the next 6-7 years. This includes operations in all of Canada, as well as some pilot operations in the Denver area. As it ramps up its staff and the complexity of its operations, Leishman says he is confident Geeks On The Way will be able to rely on Sugar to handle the increased traffic and help the company serve the IT needs for residents and small businesses in its new coverage areas.