



**Company Profile**

**Headquarters**  
Denver, CO

**Web Site**  
www.ninjatrader.com

**Company Facts**  
Provider of financial trading software for professional and retail investors

**Key CRM Requirements**  
Sales Management, Customer Lifecycle Management

**Previous CRM Solution**  
Salesforce.com

# NinjaTrader

## Automating the Customer Lifecycle

Outperforming the market is difficult, especially over the long-term. NinjaTrader provides an edge to retail and professional investors with its trading management platform which allows traders to better manage futures contracts. Since its founding in 2003, Denver-based NinjaTrader has attracted a global clientele of over 2500+ subscribers to its service.

Providing a trading service to individuals requires a large customer base, top-notch web-based support, and efficient operations. "We place a premium on automation," says John Gromala, Vice President of Sales and Marketing at NinjaTrader. "That means communicating and supporting large numbers of customer through electronic means. Our market does not tolerate inefficiency."

### Seeking Faster Results

NinjaTrader's quest for efficiency led it to reassess its Customer Relationship Management (CRM) strategy. As a start-up, NinjaTrader found that it was spending more and more on its current CRM system—provided by Salesforce.com—without gaining greater benefits. Moreover, the difficulty and lag times in configuring the application to meet its needs, meant that NinjaTrader was not meeting its business objectives. "Any time a process is lengthened, that costs us money," says Gromala.

The NinjaTrader management team decided to evaluate other CRM systems that would cost less and deliver more than

Salesforce.com. "We looked at a lot of different applications and evaluated them based on the cost and projected ROI as well how quickly we could implement the system," says Gromala. NinjaTrader settled on Sugar Professional™ On-Demand based on its lower cost, deep functionality and the ability to get up and running in a matter of weeks, not months.

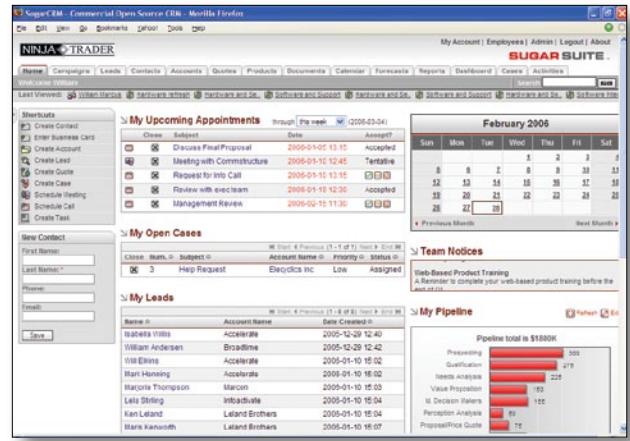
### SugarCRM for Customer Lifecycle Management

In adopting SugarCRM®, NinjaTrader integrated its business process into the system in order to automate the entire customer relationship. When a prospect fills out a Web Form on www.ninjatrader.com, a lead is automatically converted and assigned within Sugar Professional. When that lead is converted, contact information within Sugar is automatically populated. "We have a much better grip on expected revenues due to Sugar, which helps us manage our business more effectively," says Gromala.

*"SugarCRM is our most mission-critical business application. It truly gives us the pulse of our business."*

John Gromala  
Vice President of Sales and Marketing  
NinjaTrader

NinjaTrader's service is offered in three or 12-month increments, so ensuring customer loyalty and preventing churn is critical to maintain the company's fast growth. With Sugar, NinjaTrader monitors when customer renewals come due and can focus on customers who have not yet paid. "With Sugar, we can forecast projected cancellations and work to prevent customer churn," says Gromala. "Our sales representatives receive a notice from Sugar before a contract is to expire so they can take action and renew the subscription."



### Understanding the Pulse of the Business

In the last year, the SugarCRM has already returned a sizable return on investment. In its quest for greater automation and efficiency, the company plans on rolling out additional functionality in the areas of customer support. "SugarCRM is our most mission-critical business application," says Gromala. "It truly gives us the pulse of our business."

### About SugarCRM

SugarCRM is the world's leading provider of commercial open source customer relationship management (CRM) software for companies of all sizes. SugarCRM's Sugar Suite easily adapts to any business environment by offering a more flexible, cost-effective alternative than proprietary applications. SugarCRM's open source architecture allows companies to more easily customize and integrate customer-facing business processes in order to build and maintain more profitable relationships. SugarCRM offers several deployment options, including on-demand, on-premise and appliance-based solutions to suit customers' security, integration and configuration needs. To learn more about the fastest growing CRM company, call (408) 454-6900 or 1 878SUGARCRM toll free in the US, email [contact@sugarcrm.com](mailto:contact@sugarcrm.com), or visit <http://www.sugarcrm.com>.

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