



**Company Profile**

**Founded**  
2001

**Headquarters**  
Sydney, Australia

**Web Sites**  
redballoon.com.au  
redballoon.co.nz  
godo.com.au

**Company Facts**  
Leading web provider of gift experiences for the Australia New Zealand markets.

Serving over 4,000 corporate customers 90,000 individuals

**Previous CRM Solution**  
Homegrown

**Key CRM Requirements**  
Sales, Account Management and Marketing to corporate clients

**Implementation Partner**



# RedBalloon Days

## Providing Customer Joy with the Help of SugarCRM®

A basic tenet of modern management is that happy workers make for more productive workers. RedBalloon Days helps companies reward employees with gift experiences that lead to greater employee satisfaction and thus greater productivity. Employees can award gifts across a variety of experiences, including aquatic adventures, culinary treats, and family excursions, among others. The service is also available to individual consumers. By any measure, the company has experienced tremendous growth since its founding in 2001, expanding from its native Australia into the New Zealand market. The company now counts over 4,000 corporations and 90,000 individuals as its clients. For its achievements, RedBalloon Days was recognized as one of the fastest-growing startups by BRW magazine in 2005 and 2006. In 2004 and 2005, RedBalloon Days received the most online visitors in the gift and flowers category, according to Hitwise, a market research firm based in Australia.

### A Focus on Flexibility

Like most start-ups, RedBalloon Days began as a lean operation, building a homegrown CRM system from a combination of Microsoft Outlook and legacy file-maker pro system that were supported by manual processes. As the company grew, its growing number of customers strained the limits of the system. Information soon became trapped in silos in each user's desktop and changes to the existing system were nearly impossible because it lacked flexibility. The ability to

forecast business and produce correct invoices became a difficult task.

RedBalloon Days decided that it was time to transition from its homegrown system and standardize on a CRM solution that would free up the company's resource for other activities. "We needed a system that would give us the flexibility to adapt to changing processes and evolve with a fast growing business," says Naomi Simson, Chief Experiences Officer (CEO) at RedBalloon Days. "And we required a system that would have the ability to integrate with existing IT systems to reduce data re-entry and wasted effort"

### Engaging Insightful

RedBalloon Days engaged with Insightful Customer Relations, a SugarCRM premier solution partner, for its CRM solution. "The product more than met our technical requirements in terms of flexibility, and Insightful Customer Relations provided the confidence that it would be well supported into the future," says Simson. After signing the contract, RedBalloon Days was up and running on SugarCRM in three weeks.

*"The integration of SugarCRM throughout the business has reduced order processing from a half a day to less than one hour, once per week,"*

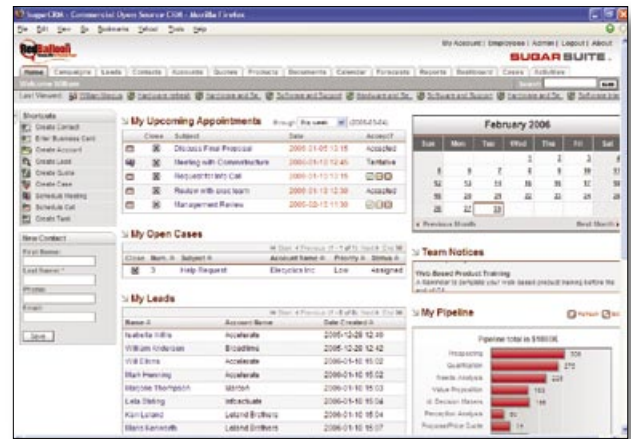
Naomi Simson  
CEO  
RedBalloon Days

“With the help of Insightful, the transition to SugarCRM was seamless,” says Simson. “Sugar has very strong capabilities for account and opportunity management as well as marketing campaign functions our team uses on a daily basis. If we need additional functionality, it is easy to make changes because the system is so flexible.”

Insightful has delivered incremental enhancements, including integration with the RedBalloon Days production and fulfillment system. Using SugarCRM’s SOAP XML API web services interfaces, customer information is synchronized between the company’s web site, eCommerce portal and SugarCRM. Sugar also keeps track of gifts redemptions and allows salespeople to know the exact status of customer accounts.

### Joyful Benefits

RedBalloon Days realized immediate benefits from the deployment of SugarCRM. Manual processes which required a lot of time and resulted in errors were eliminated. “The integration of SugarCRM throughout the business has reduced order processing from a half a day to less than one hour, once per week,” says Simson.



Sales people have a better hold on customer activity and marketing can more effectively manage its lead generation activities. “We have seen tremendous results from using SugarCRM,” says Simson. “Our team can more effectively share data, which is more accurate because of the way Sugar integrates and automates our processes. Our marketing team has become more effective in communicating to the right customers at the right time and our sales people have a much clearer process for interacting with customers and managing their pipeline.”

### About Insightful Solutions

Insightful Solutions is a specialist SugarCRM solutions provider, focused on helping clients across Australia and New Zealand grow revenue and profitability through improved customer relations supported by interfacing a SugarCRM system with existing processes and systems. Insightful provides professional implementation, customisation, training and support services, and offers both hosted and on-premise solutions. To learn more about Insightful Solutions, call (Aust) 1300 307 147 or (Intl) + 61 2 9460 4533, email: [info@insightful.com.au](mailto:info@insightful.com.au), or visit <http://www.insightful.com.au>.

### 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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