



BZ Results

Shifting Into Overdrive with SugarCRM™

Company Profile

Founded
1998

Headquarters
Coventry, RI

Web Site
www.bzresults.com

Company Fact
Provider of digital marketing and eCRM solutions to the automotive industry

Previous CRM Solution
Goldmine

Key CRM Requirement
User adoption, Email Processing, Customer Service, Activity and Opportunity Management

Number of Users
100

Estimated Cost Savings Over Three Years
\$60,000

SugarCRM Implementation Time
Three months

With over 800 customers and a company that has grown from 20 to 100 employees in two years, BZ Results is used to moving fast. BZ differentiates itself relative to larger competitors with an intense focus on customer responsiveness and satisfaction. Indeed, one of the core values of the company is that every employee must have access to the customer information that impacts their roles. Anything less than superior customer service from BZ employees, which provides digital marketing, eCRM, and training solutions to the automotive industry, is not acceptable. So when the company identified Goldmine, its existing CRM solution, as an obstacle to maintaining its growth, they decided to make a change.

A Rigorous Vendor Analysis

“When the word comes down that IT needs to implement a new CRM system, a lot of CTOs start updating their resume because there are so many points of failure,” says Rob Lackey, Chief Technology Officer, BZ Results. “That is why we conducted a thorough evaluation of the leading vendors, including Microsoft CRM, Salesforce.com, Siebel, SugarCRM and what it would cost to make our Goldmine solution work the way we needed.” Based on 46 requirements collected from stakeholders across the enterprise and grouped as “primary”, “secondary” and “tertiary” levels of importance, Lackey’s team first eliminated a continued investment with Goldmine, as the application was limited to contact management functionality and suffered from poor user adoption due to its

difficult user interface and low reliability. After further discussions, BZ eliminated Siebel and Microsoft from their evaluation based on concerns regarding product direction and price.

Vendor Selection

That left salesforce.com and SugarCRM. After evaluating the functionality of the two systems, Lackey’s team determined that SugarCRM offered deeper functionality and a better user experience. “SugarCRM came up huge in our analysis,” says Lackey. “We did not want to have to go out and buy a bunch of CRM for Dummies books for our reps to learn the system. It needed to be intuitive, it needed to be versatile, and, above all, it needed to work on our terms. SugarCRM’s better functionality, the flexibility of being able to select a hosted, appliance, or on premise implementation, along with the fact that salesforce.com was going to charge us to integrate our other applications through their platform, made it an easy decision in the end.”

“We paid for a CRM application. We ended up getting a customer-centric communications platform that our entire company could work with.”

Rob Lackey
Chief Technology Officer
BZ Results

A Customer-Centric Communications Platform

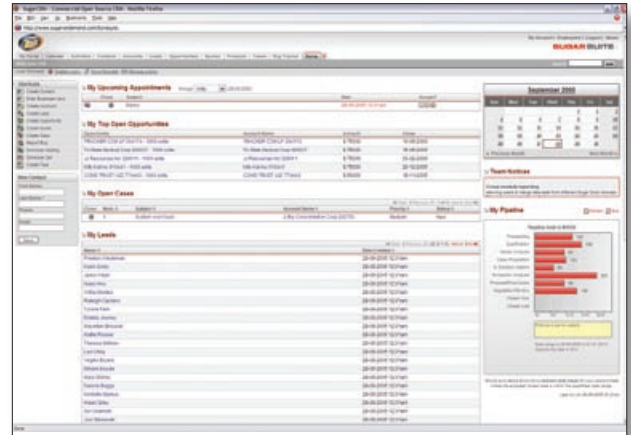
A key factor for replacing its previous CRM system and choosing SugarCRM was to implement an application that would ensure each decision within the organization was driven by a customer need. “CRM is useless unless it is integrated across the entire organization,” says Lackey. “That means tying the information from SugarCRM into our Dealer Management, ERP, and Human Resources systems.”

To that end, BZ is using Sugar Professional™ as a platform to coordinate activities across the entire company. BZ is using SugarCRM to capture and share leads, manage opportunities and teams, handle customer service cases, and process inbound emails. Workflow automation coordinates the flow of information within and outside of the SugarCRM system. For example, the workflow automation searches for closed opportunities and triggers new projects based on the change of status. “We now have a single application that our entire company can use to share information that is laser-focused on the same driver as we are: the customer,” says Lackey.

Joining the Community

Selecting SugarCRM offered an additional benefit: support and information-sharing across the SugarCRM community. Unlike proprietary software vendors, SugarCRM actively participates in, and solicits feedback from, members of the SugarCRM community regarding product quality and direction. This feedback is incorporated into SugarCRM product releases which are shared with customers. Lackey’s team participated in the SugarCRM 4.0 Community Preview, a chance for customers to actively test new features in Sugar Suite™ 4.0, reports bugs and provide feedback.

“Sugar Suite 4.0 has my entire organization excited from front to back, as it represents a real community effort in which we could actively participate,” says Lackey. “The feature list feels like the SugarCRM development team raided my Christmas wishlist. Workflow automation, customizable dashboards,



enhanced lead sharing; every feature fulfills a demonstrated need. The advanced campaign functionality alone replaces an equivalent \$10,000 outsourced investment. We are amazed just how dialed in the SugarCRM team and community are to business demand, as they deliver strong products to market with astonishing speed.”

Lasting Benefits

At BZ Results, the implementation of SugarCRM has gone better than the company expected. “We paid for a CRM application. We ended up getting a customer-centric communications platform that our entire company could work with,” Lackey says. User adoption stands at 100 percent with reps using the system in the office and on the road. “It is harder to keep users off Sugar Suite than to keep them on,” says Lackey, who adds that the wireless capabilities make a huge difference. “When a rep walks out of a meeting he can change the status of an opportunity in the parking lot rather than waiting until he gets back to the office and having to remember to update the system. When he makes that change instantly, that triggers a whole new set of processes within Sugar Suite that makes our company that much more responsive to customer needs.” For that reason, and many others, Lackey calls SugarCRM “an easy investment to justify that delivers more than we want, faster than expected, which keeps my company agile, my department strong, and my resume safely collecting dust.”