



## it-novum

A German-based software services provider turns to Genius4U and Sugar Professional™ to close the loop between sales and marketing.

### Company Profile

#### Headquarters

Fulda, Germany

#### Founded

1960

#### Solution

Sugar Professional

### Company Description

Software service provider specializing in open source solutions

#### Website

[www.it-novum.com](http://www.it-novum.com)

#### Implementation partner



it-novum was hurting from the inability to close the loop between sales and marketing within its existing CRM solution. A previous deployment of Microsoft Dynamics CRM hasn't got the job done, and it-novum was forced to build the solution again from scratch. In the end, it came down to looking at their own experience with open source for a flexible application that it could deploy through sales and marketing. Finally they found Genius4U and SugarCRM® as the right solution.

### It's All About the Sales Methodology

For it-novum, the key was finding a solution that could mimic the company's sales methodology. "We had implemented the Miller Heiman method, so it was critical that the CRM solution we installed was a mirror of those processes," says Christoph Steinhauer, director of marketing at it-novum. "The additional approach was to increase usability and speed of daily work which we were lacking with Microsoft Dynamics CRM—the user interfaces had too many screens, too many clicks to become a favorite tool for sales."

It was at that point that it-novum decided to consider open source. "As a company we're very familiar with open source," Steinhauer says. "We have our own open source offerings, so we gave it a try." After discovering and interacting with SugarCRM at a European open source conference, their next main issue—easy campaign management and easy feeding of campaign members—was easily solved with built-in capabilities and functions in SugarCRM. Once the decision for Sugar came close, it-novum was looking for a Sugar partner able to provide implementation and adoption services. They came across Genius4U based on several recommendations, and after an initial workshop the implementation and rollout of Sugar

Professional began in January of 2009 to 16 users in sales and marketing.

"Genius4U was great. They brought the knowledge we lacked about SugarCRM and developed additional modules we needed. So we went live with a solution fitting our needs, but the openness of Sugar enables us to customize the existing parts ourselves as well," Steinhauer says. "All told, the implementation, rollout and data migration took just two months."

### The Results

Perhaps the biggest benefit has been the ability to close the loop between sales and marketing, all through SugarCRM. Prior to deploying Sugar, it-novum was forced to run its web-based marketing initiatives through separated applications or service providers. With Sugar, Genius4U was able to provide the same functionality via use of Sugar Professional's Web-to-lead functionality and reporting engine.

"With Sugar, we felt we could accomplish the same abilities without having to bring in a separate vendor," Steinhauer says. "With the Web-to-lead capabilities and campaign management, we're now tracking responses from Webcasts, email campaigns, etc., and auto-

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Christoph Steinhauer  
Director of Marketing  
it-novum



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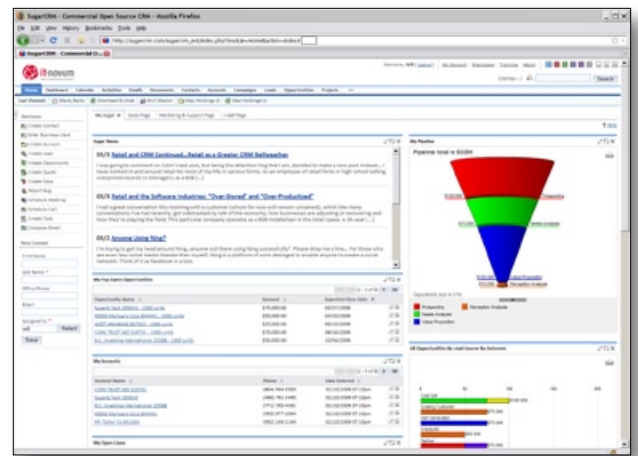
populating that information back to sales as leads. And the custom reports allow us to gauge how our sales pipeline is being influenced by marketing and track those ROI back to individual campaigns.”

Sales has also benefited thanks to the reporting, with management leveraging improved visibility into revenue and pipeline streams via Sugar Professional’s reporting engine. “We’ve really closed the loop between sales and marketing and it’s starting to show in our revenue,” Steinhauer says.

End-user adoption has been so successful that it-novum is now in the process of expanding the deployment throughout the entire enterprise unit, which means an additional 25 users. “Right now we’re leveraging SAP to handle all of our offering processes in Sugar,” Steinhauer says. “Order management, invoicing, contracts and billing are still running in SAP, but are all visible through Sugar via an interface with SAP. As both systems update themselves automatically and trigger processes in the opposite system automatically—anybody at it-novum facing a customer request can use holistic information in real time.”

#### About it-novum

it-novum is a service provider with long standing experience in implementation and operation of it-systems and solutions. As well as daughter and it-provider within the stock listed KAP group and as partner of mid-sized and large enterprises it-novum covers a broad range of industry and business solutions. it-novum delivers highly customized solutions through its “best-source” approach for ERP, ECM, ITSM and BI which combines closed and open source offerings through integration.



#### About Genius4

Genius4U as a consulting company offers its customers simple, economic and effective solutions, nationally and internationally. We are CRM experts with years of CRM Know-How. Together we will find the right solution for your requirements. Ingeniously simple solutions, Genius4U. Offices in Hamburg, Munich & UK

[www.genius4u.de/](http://www.genius4u.de/)

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