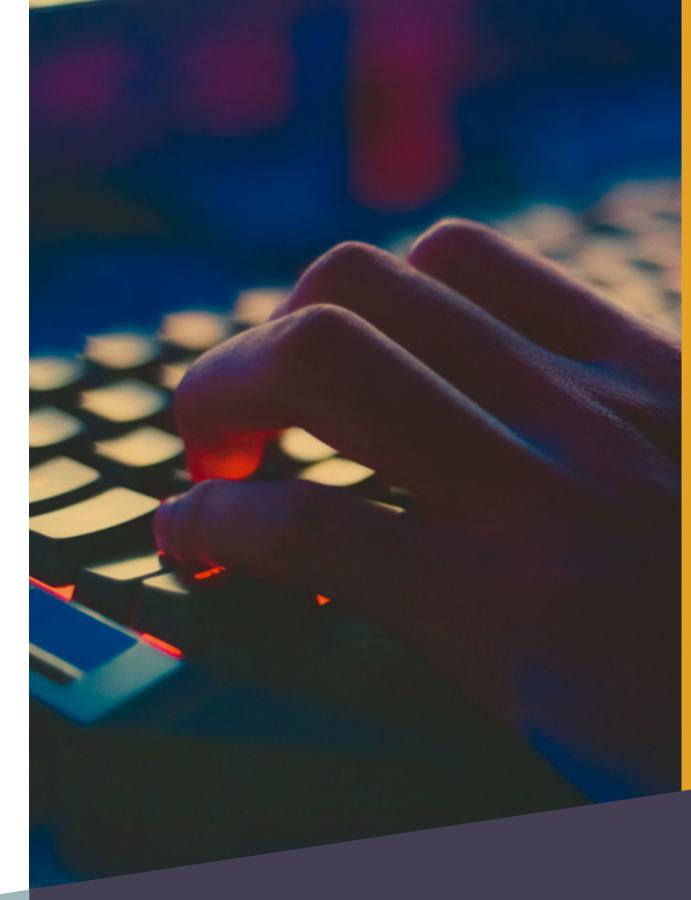Sales**Agility**

Case Study

IT Solutions Provider

CASE STUDY

IT Solutions provider invest in SuiteCRM

The company needed a CRM system to provide a complete overview of their interactions with leads and contacts, enabling a more strategic approach to be implemented to their sales activities.

CUSTOMER NAME:

Not available. This is a real case study, approved by the customer.

CUSTOMER DETAILS:

IT Solutions provider based in England.

ORGANISATION TYPE:

Information Technology and Services.

EMPLOYEES:

2000+ Employees Globally.

SUMMARY OF KEY BENEFITS:

- Control permissions by area and roles.

- Streamline workflows and processes enabling sales teams to work efficiently and effectively.

- Enhanced visibility for management of sales.

Managing Programmes Seamlessly with SuiteCRM

Our client is a leading provider of innovative IT solutions for many vertical segments, including Federal and State Governments, Defence and Homeland Security, Utilities, Process, Power, Financial Services, Manufacturing, Retail, and Healthcare. These enterprise solutions are built around the company's intellectual property and domain expertise which offers unique business intelligence and impactful insights for effective decision making. With this in mind, a customised CRM platform was required to allow for strategic monitoring and evaluation of their business processes. It was also needed to streamline the sales function, flagging to management when customers were either lost or won, allowing easy identification of their important accounts.

The Challenge

The company needed a CRM system to provide a complete overview of their interactions with leads and contacts, enabling a more strategic approach to be implemented to their sales activities. This was seen as a crucial tool to develop new and existing relationships within their client base and to also identify those relationships which are most valuable. The system would also allow the management team to implement different levels of controls and permissions based on an employees area and role within the business. This was seen as beneficial as the CRM provides a centralised and secure space whereby all relevant documentation could be stored.

Key Problem Solved

SalesAgility worked with the client to deliver a facilitated requirements gathering workshop followed by agile development sprints. This allowed the company to refine and test the solution at every stage of the journey leading to the following key features being developed;

- **Centralised System:** Created a single repository for all contact information and documentation across the full organisation allowing our client to customise modules and fields to suit their business requirements.

- **Restricted Access:** SalesAgility created control permissions for the management team to implement depending on an employees area or role.

- **Strategic Solution:** SalesAgility have provided a solution which streamlines sales processes and also provides the opportunity for our client to add value to their customer offering. By adding time trackers to opportunities they are now able to identify and rectify bottlenecks within the various sales stages.

- **Continuous Improvement:** SuiteCRM enables the management team to be notified when a sales opportunity is won and likewise, flag with them when an opportunity is lost. If the

latter happens then a workflow requires the user to provide an explanation determining why the opportunity wasn't converted, and thereby providing a better understanding of where the business can improve.

- **Business Analytics:** SalesAgility created a system that would allow the company to easily categorise and report on their sales efforts to focus on successful activities and identify important accounts.

Our client now has a high quality configured SuiteCRM system which is tailored to their unique requirements allowing them to identify key customers and track how their sales activities are impacting the company's ROI to ensure continued future success.

About SuiteCRM

SuiteCRM is the world's most popular open source CRM with over 800,000 downloads and an estimated 4.5 million users world wide.

Key features include sales, marketing and service modules. SalesAgility is the driving force behind SuiteCRM and the logical option for enterprises and organisations looking for professional SuiteCRM services, such as migrations, consulting or training.

SalesAgility also offer SuiteASSURED a total care package for SuiteCRM.

For more info, as well as a free demo, check out: **www.suitecrm.com**