



## Case Study

Humanetics Innovative Solutions

CASE STUDY

# Humanetics Innovative Solutions

Humanetics Innovative Solutions uses SuiteCRM to increase visibility, consistency and collaboration.

**CUSTOMER NAME:**

Humanetics Innovative Solutions

**CUSTOMER DETAILS:**

Offices in US, Europe, China, Japan, India

**ORGANISATION TYPE:**

Privately Held Manufacturing Company

**EMPLOYEES:**

501 – 1000 Employees

**PROJECT GOALS:**

- Centralised repository for all customer information, providing global visibility and improved activity management.
- Increased efficiency and consistency through standardised quotation and customer service processes.
- Ability to run targeted, multi-channel marketing campaigns for greater customer insights.

## Project Goals

The CRM implementation was driven by three primary goals:

1. Obtain global visibility of customer contacts and activity through a single, centralised data repository.
2. Improve efficiency and visibility by standardising quotation and customer service processes.
3. Run targeted multi-channel marketing campaigns to gain greater insight into customer behaviour.

## The Challenge

Previously, all customer data resided in an ERP system with limited access and no relationship management capabilities. There were no tools in place to monitor customer satisfaction or support marketing activities. This was the company's first CRM implementation; therefore, successful user adoption was essential, along with SuiteCRM consultancy throughout the process.

## The Solution

To kick off the implementation, a three-day on-site workshop was held in Detroit, US, facilitated by the SuiteCRM team. During this workshop, initial requirements were captured, core CRM features were defined, and acceptance criteria were agreed upon. This collaborative approach laid a solid foundation for a solution tailored to Humanetics' business needs.

The outcome was a centralised, accessible repository for contact data, which significantly improved visibility, consistency, and cross-functional collaboration.

*"The SuiteCRM team has surpassed our expectations with swift communication channels and great results resulting in a smooth deployment of the SuiteCRM product."*

MARK BROWN, TECHNICAL SALES SPECIALIST AT HUMANETICS

## Customised Implementation

SuiteCRM was tailored to Humanetics' specific processes, with key customisations including:

- A three-level account hierarchy with roll-up features, editing restrictions, and validation rules based on account status.
- Integration with six ERP databases to retrieve data on accounts, quotes, orders, invoices, CCRs, RMAs, product categories, currency rates, and contracts.
- Embedded sales workflows within the Opportunity module, varying by business unit, with validation rules triggered at different opportunity stages.
- Implementation of a 12-month forecast report, sales summary report, and fiscal year reporting by combining CRM and ERP data.
- Integration with the OTRS support ticket system for access to technical issue history.
- Enhanced campaign management tools, including approval workflows and social media metrics, plus event management with expense tracking and ROI reporting.
- Integration with the Licence DB to retrieve licence information and trigger renewal workflows.
- Survey creation and distribution within SuiteCRM, with automated workflows based on responses, including integration with back-end shipping processes when needed.

The implementation was completed in three months, followed by end-user training and ongoing development and consultancy support.

*"Jim and the SuiteCRM team have been great to work with. They are always quick to respond to our requests in customizing the SuiteCRM product to our specific needs."*

KATIE FORAN, SALES DIRECTOR AT HUMANETICS

## About SuiteCRM

SuiteCRM is the world's most popular open-source CRM, with over 1.7 million downloads and an estimated 5.8 million users worldwide.

It offers a cost-effective, flexible platform that helps organisations manage relationships and automate processes across sales, marketing, service, and reporting.

As the developers behind SuiteCRM, we specialise in delivering bespoke solutions and professional, end-to-end services. For organisations seeking additional assurance, we offer SuiteASSURED - a fully supported, secure version of SuiteCRM with a comprehensive total care package.

To learn more or schedule a personalised demo, visit: [www.suitecrm.com](http://www.suitecrm.com)