

VPI

VPI Streamlines Lead Management And Delivers Outstanding Customer Experience With SugarCRM® And Pardot Integration



Sugar Partner Acts93 Manages Switch from GoldMine and Completes Multiple Customizations

VPI, a leading developer and provider of customer experience and workforce optimization software, turned to SugarCRM to consolidate multiple legacy applications on a single, web-based platform. With the help of Sugar partner Acts93, VPI integrated Sugar with Pardot, simplifying operational processes and providing real-time customer information on demand to deliver the industry's best customer experience.

Business Challenges

After 15 years in business, VPI faced a challenge common to many mature companies: information spread across multiple legacy systems including, in this case, a GoldMine CRM application. This had several negative impacts on VPI's operations. The company found it difficult to enforce a standard sales process or generate accurate long-term forecasts. It was challenging to track the time sales reps spent pursuing sales opportunities. And, VPI generated many of its reports using Excel spreadsheets, which were often distributed in hard copy or emailed to locations outside of headquarters. Finally, there was no integration between GoldMine and the VPI website. "Prospects could fall through the cracks," recalls Patrick Botz, vice president of marketing for VPI. "We really wanted to get rid of the legacy applications and unify all our departments on a single platform. A web-based system that could support the needs of our entire company was very attractive."

The Solution: Sugar Professional

As the company considered various CRM solutions, VPI chose Acts93 as its Sugar implementation partner. Acts93 oversaw the CRM evaluation process and helped VPI match its needs to an appropriate solution. VPI wanted a web-based, on-premise solution that would accommodate its Microsoft SQL database and could support internal departments as well as a web partner portal. Sugar met all these requirements; plus, many customizations were easy to make and it offered excellent price to value. "Since Sugar is open source, many customizations are very straight forward," explains Botz. "So we were able to do several customizations that really helped improve our sales process." For example, automated workflows in Sugar ensure that follow-up calls are automatically scheduled for the appropriate employees when inquiries come in from the website or tradeshow, and sales reps now follow a standard procedure throughout the sales process. In addition, an account view provides consolidated visibility into large enterprise relationships.

Acts93 also integrated Sugar with Pardot, a marketing automation solution. With the Pardot integration, visitors to the VPI website automatically appear as leads in Sugar. "We used to have someone manually enter leads from the website into our CRM system," Botz continues. "But we've been

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Patrick Botz, Vice President of Marketing, VPI

able to reduce manual lead data entry by nearly 100 percent, virtually eliminating that function and allowing the person responsible to focus on higher value tasks.”

In addition, VPI found Sugar’s InsideView module to be a powerful sales and networking tool. “Having direct access to InsideView within Sugar has been phenomenal,” Botz notes with enthusiasm. “Account managers can instantly look up contact information, get more information about the contacts they’re already working with, and import that directly into Sugar.”

VPI employees can also use InsideView to find and connect to key decision makers at a company. “InsideView helps us more easily generate warm referrals utilizing connections from our extensive network of employees, customer reference accounts, and previous co-workers,” says Botz. “It’s all right there in Sugar, right at our users’ fingertips.”

Business Benefits

VPI, which has been rated as a top software vendor in the Ventana Research Value Index, recognizes Sugar as a major contributor to its reputation for delivering an outstanding customer experience. With its Sugar solution, VPI staff can access real-time customer information on demand, even while traveling. Customizable home page dashboards support users with personalized views into data such as sales opportunities, customer activity, and maintenance status. Sugar has simplified and automated formerly manual, paper-based processes, enabling VPI to spend more time

helping customers get maximum value from the company’s products. The solution has also increased the accuracy of sales forecasting and made it possible to track the ROI of marketing campaigns.

“We constantly get feedback from customers and prospects on how quickly we respond to questions,” Botz notes. “And we’ve been well rated in several analyst publications. SugarCRM is the tool behind the scenes that helps us to maintain exceptional relationships with our customers.” In the future, VPI plans to integrate its support team and service ticketing system into Sugar, further consolidating operations. And, as VPI continues using the Sugar platform, it expects to see higher customer satisfaction rates and shorter sales cycles.

Sugar has also changed Botz’s role in VPI, giving him more opportunities to directly engage with customers. “Sugar’s robust marketing workflow automation has allowed me to spend 30 percent more time meeting with customers.”

VPI gives much of the credit for the success of Sugar to Acts93. “Acts93 is one of the best partners I’ve worked with in 15 years of being in enterprise software,” concludes Botz. “They’re on the ball; they have a great support team; they respond quickly; and their customizations have been wonderful in helping us meet our business objectives with Sugar.”



Company Profile

Headquarters:
Camarillo, CA

Founded: 1994

Company Description:
VPI is the world’s leading developer and provider of Customer Experience and Workforce Optimization software solutions and services for contact centers, enterprises, trading floors, government agencies, and first responders.

Website:
<http://www.vpi-corp.com/>

Solution:
Sugar Professional

Solution Partner:
Acts93

About VPI

VPI is the world's leading developer and provider of Customer Experience and Workforce Optimization software solutions and services for contact centers, enterprises, trading floors, government agencies and first responders. The unique, award-winning VPI EMPOWER™ Web-based software suite integrates call recording, quality management, interaction analytics, performance reporting, E-learning and conversational virtual call agents. This groundbreaking solution suite enables organizations to radically improve customer experience, optimize operational performance, minimize risk and ensure compliance with less staff than ever before possible. Learn more about VPI online at www.vpi-corp.com.

About Acts93

As a leader in CRM implementations, with hundreds of companies served, your goals for a SugarCRM implementation are in reach. Our trained staff is not only technically advanced, but also has a minimum of 14 years experience in applying business process to CRM software projects. Your Microsoft SQL environment is no problem and we have Visual.Net expertise. Acts93 staff and consultants have more than 6 years experience successfully installing and maintaining SugarCRM. Current clients have recognized our leadership in working with the SugarCRM community to help improve the product and offer solutions to issues.

Laguna Niguel, CA, www.acts93.com

SugarCRM

Customer relationship management (CRM) software for business. In the cloud, online, on-demand, or on-site—the best sales, email, and mobile CRM integration.

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