

THIS IS HOW i CRM: **REDGLAZE GROUP** ALIGNS THE ENTIRE TEAM TO DELIVER CUSTOMER SUCCESS



INTRODUCTION

Mention the “Friday meeting” within the offices of the Redglaze Group and eyes roll.

About 20 staff hours burned each week, as the accounting department and project managers parsed each project for invoicing or payments.

“A real time eater,” laments CEO Dean Jessick.

Today, the meeting is gone, nothing more than an anecdote from the days before Sugar.

The more recent Redglaze stories revolve around the world's most innovative and affordable CRM: how it empowers their employees; how their sales, project managers, and accounting teams share data in seconds; and how all employees – regardless of department – project a consistent, professional image across the various Redglaze Group companies.

From the executive suite to the accounting clerk, here is how the Redglaze team capitalizes on Sugar's ease of use and flexibility to inform every customer interaction and become more productive.



REDGLAZE GROUP

Industry: Construction, manufacturing, and technology

Headquarters: Omaha, Nebraska

Satellite Offices: Des Moines, Iowa; Kansas City, Missouri; Minneapolis, Minnesota; North Sioux City, South Dakota.

Website: Redglaze.com

The Companies:

- Redglaze Group: an architectural and engineering group with a technology background, whose companies provide products and services to the construction industry
- Design Logistics: blast-resistant building construction
- HGI Resources: construction project management
- MGS Distributing: glass, metal fabrication and distribution
- RGI Image: building façades and maintenance
- RTI: hardware and networking solutions
- Bitbasic: software solutions
- SGH: custom architectural products distribution and installation



CHALLENGE: Achieve consistent customer interactions across all business units, create cost efficiency, and share data instantly among headquarters and satellite offices with field team members.

SOLUTION: Sugar Professional, hosted on-site; integration of accounting programs and easy migration from previous CRM; customized Sugar modules and specialty portals for subcontractors and internal departments; deployed to nearly 74% of employees in Redglaze Group companies that have implemented Sugar.

RESULTS: • Improved management of information throughout the customer lifecycle (from pre-sale through purchase, design, and development, to construction and maintenance) • 30% increase in efficiency through project management and sales tracking • Streamlined resource-sharing • 60% reduction in server space • Increased consistency in customer-facing interactions across all companies • Eliminated meetings and saved time • Improved cash flow

EMPOWER THE ORGANIZATION

Dean runs eight businesses within Redglaze Group. Five are in the construction industry, two are in technology, and Redglaze Group provides operational business support services to the affiliate companies. The headquarters is in Omaha, Nebraska, with satellite offices in four states.

An electrical engineer by education and an avid techie, Dean knew that his rapidly growing companies had matured beyond the previous CRM solution.

“We were getting forced into a box: we could buy a software package that might work for one of our companies but not for another. We’ve got to manage a lot of people in different locations, and we have to track a lot of moving pieces. Our development team said we could do it all with Sugar,” recalls Dean.

The team believed the right CRM could act as a true management platform to help Redglaze’s construction companies deliver superior customer service and make better use of resources in a bruising industry that counts pennies the way it measures 32nds of an inch.

The goals: integrate core functions in accounting, marketing, human resources, project management, and IT to facilitate staff crossover; create a data-sharing platform that provides project-specific information to internal staff without clutter or data security breaches; and establish a customer-facing presence and process that is uniform throughout the Redglaze business units.

“We probably are seeing a 25 to 30 percent increase in efficiencies; that’s how much more work we can manage with the same number of people,” Dean says.

Today, within the Redglaze companies using Sugar, nearly 74% of employees rely on direct access to the SugarCRM system to help them do their jobs.

The organization enjoys enduring success with Sugar, seeing ongoing gains in staff empowerment, a fortified and consistent company image, and easily customized Sugar modules that win back time and make jobs easier on a daily basis.

A SALES VIEW THAT BUILDS CONNECTIONS

Marketing and Technology Development manager Craig Hammond talks about the importance of photographs in helping staff members engage with current and potential customers.

“Our salespeople live around photos,” he says. “When they are meeting with an architect, they can call up a project photo and show our previous work right there.”

Even more impressive is what is connected behind the pixels.

With a click or swipe, the salesperson can drill down from the image to identify the building materials, square footage, the architect or the general contractor, among other key pieces of information about the job.

“We are able to provide that up-to-date information on the fly to everybody in the field. Even if something happened only hours before, the information is always there,” says Craig.

That’s crucial for salesman Tom Hon: “I can pull up what I need in 30 seconds. In the other programs, the information never would have been accurate. With Sugar, I don’t worry about that. I only get paid on what I sell, and now I’m more productive because I have better information.”

HOW i CRM: THE MANAGEMENT VIEWPOINT

CEO Dean Jessick’s customized Sugar dashboard is designed to give him a high-level vantage point across all of the Redglaze Group’s businesses. It provides just the information he needs to make decisions and manage his team, freeing up his time to pursue new business opportunities for the company.

His view includes:

- Financials from each business unit
- Cash on hand
- Employee count
- Sales to budget projections
- Project tracking
- Jobs completed
- Projects completed within budget
- Dashlets and links to integrated management/financial software

“I only get paid on what I sell, and now I’m more productive because I have better information.”

Tom Hon
SGH Sales Representative

IMPROVE THE EXTENDED CUSTOMER LIFECYCLE

Because Redglaze's involvement in a single project often stretches into years – from discussions about specifying materials, to the bids, final plans and engineering – having the correct answers to on-the-spot questions builds trust with clients and prospects.

“Sugar allows us to behave as a very organized, professional group because we have the ability to empower our salesmen, project managers, engineers – anybody – to get the right data, the right answers, to the right people at the right time. So it instills confidence for our customers in those answers, and it makes us look that much better,” says Dave Meinzer, president of Design Logistics, the unit that creates blast-resistant building facades.

Plan details, photos, case studies, and engineering data on a project or product are updated as soon as new information is added through Sugar.

Heather Evans, an accounting clerk, feels empowered to act decisively without enduring those Friday meetings, because she has confidence in the data she pulls from Sugar.

“For us to be able to sit down and work as a team because we have all the information in front of us -- Sugar makes my day free from worries about whether I have done my job to perfection,” she says.

With Sugar in place, everyone does their job better because they know more about their role in a project or function. When turned outward, that knowledge inspires client confidence in Redglaze.

“The customer experience we are shooting for when we use Sugar is, we want it to be effortless on their part,” says Dean. “When we come across as a team of professionals giving them everything they want and in a simplified form that is easy to understand, it's a no-brainer.”

From field staff to administration, Sugar gives the entire team the tools to address every customer interaction consistently and effectively.



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Dave Meinzer,
Design Logistics President

AUTOMATED CUSTOMER, DOCUMENT, AND PROJECT MANAGEMENT

Because of Sugar, Matt Jessick is stronger – and happier – as project manager for RGI Image, which maintains showroom exteriors for about 150 auto dealerships nationwide.

Matt manages maintenance schedules and multiple crews. He has to know everything about every project – from building height to the dealers' preferences about cleaning days and equipment placement restrictions.

Life at work is better today, Matt says, because his Sugar dashboard is in front of him at the start of each day.

“Within 20 minutes, I know what my priorities for the day are, instead of taking three hours to get set up,” he says. “There is no longer a danger of something falling through the cracks, because we have automated triggers that tell me what I need to pay attention to at any time.”

One of his colleagues calls Matt a “dashboard master” because he adapted so quickly to Sugar, and configured his own dashboard as well as dashboards for other project managers. Matt admits to creating a few dashlets – two he uses regularly are Google Maps and Pictometry.

“I can have an aerial view of the dealership right next to my notes on the dealership and projects in Sugar. With that dual view, I can pretty much discuss any issue that might come up on-site,” he says.

Prior to Sugar, Matt had no effective way to bring up all the information he needed regarding scheduling and dealer preferences when he was plotting a maintenance crew schedule or talking with the dealership.

“My desk was full of sticky notes, and I was using Outlook for calendar reminders,” he says. “Today, with Sugar, I’m not littered with sticky notes anymore.”

Jeremy Zerzan is similarly grateful to be out from under the white noise of irrelevant information.

As a project manager for SGH, which handles the production and installation of architectural metal products, Jeremy would get a raw data dump when he was assigned new projects.

Much of the information had no connection to his work, and no relevance to his team. Plus, it was scattered: spreadsheets and memos were in Google Docs, photos were in Dropbox and emails were forwarded via Outlook – if the person forwarding them remembered to retrieve them at all.

“In the previous system, it was time consuming and tedious to go in and find the documents you needed. Someone may have named them something else, and you just had to read through a lot of material,” Jeremy says.

“Now, once a project is sold, I can go into the Opportunity module to create and manage just the documents I want to see.”

ISSUE RESOLUTION IN MINUTES, NOT DAYS

Having the right documents at hand was a critical element in the fast resolution of a recent field problem.

When a conflict in dimensions occurred on a job site – a problem that could have caused days of costly delays – Jeremy shared critical documents with the subcontractor through a Sugar-linked portal developed by Redglaze software engineers.

Jeremy and the subcontractor viewed the plans together, identified the source of the conflict, and resolved the issue quickly.

“Prior to Sugar, issue resolution could take hours or days. With Sugar and the subcontractor portal, we can analyze the issue, have one phone call, and put it to bed. We’re talking a single phone call, which could be 10 minutes,” says Jeremy.

Using the portal, contractors also can upload photos, so Jeremy can remotely get instant looks at job progress or potential problems.

“The efficiencies and being able to organize the information and communication is fantastic, internally with the SGH team and externally with our subcontractors,” he says. “Sugar has made me a better project manager through time management and document handling.”

An attractive side benefit: By consolidating documents in Sugar, Redglaze has reduced server space by 60 percent while continuing to grow its business by 30 percent.

Because all data is in one location and easily shared within Sugar, stakeholders have the information at their fingertips for clients or contractors, and no longer burn time sorting through irrelevant materials.

HOW i CRM:

A PROJECT MANAGER'S VIEW

Jeremy Zerzan's project management dashboard includes everything he needs to keep every construction project humming along, with details from across all of his jobsites, teams, and subcontractors. His view includes:

- Favorite reports: Billing Cut-off, Open Subcontractor Purchase Orders, Issue Tracking, and Overall Project Overview
- Current projects, including links to jobsite photos and aerial images
- Prioritized list of in-process tasks needing attention
- Accounts

“Prior to Sugar, issue resolution could take hours or days. With Sugar...we can analyze the issue, have one phone call, and put it to bed.”

Jeremy Zerzan
SGH Project Manager



DEFINED BY BUSINESS, NOT BY CODE RESTRICTIONS

Sugar provides the Redglaze Group with significant improvements in departments beyond sales and marketing, and has been easily customized to suit their particular industry and goals.

At Redglaze, the development team has expanded Sugar to encompass accounting, HR, project management, and other business-critical processes.

“We were trying to use our previous CRM as a business platform and it was pretty rigid. So we started trying to make it better,” says software engineer Sean Pinegar. “But when an upgrade came through, you had to spend \$20,000 to upgrade because you had to make sure all your customizations would be compatible.”

“Sugar has clearly thought about that. When an upgrade comes through, it doesn’t affect anything I’ve customized,” he says.

The team has created modules for operations, document storage, projects, photo management, and website analytics, among others. Most customization has been simply accomplished through Sugar Studio, which provides drag-and-drop functionality to diminish the need for custom coding.

The development team has also written portals to allow role-specific access and process management, including a custom subcontractor portal and additional portals for in-house use.

A recently completed solution for Human Resources has more than 20 modules and includes a portal for employees who want to request time off or update personal details.

“There was a lot of paperwork and process that HR had to deal with on a daily basis that is now being reduced,” Sean says. “We probably would have had to hire another full-time HR person if it weren’t for this solution.”

Because staff is shared across company lines so frequently, Sugar continuously updates organizational charts for each project, and adjusts access to internal project and customer data accordingly.

For accounting, the developers wrote an invoicing module that stores all relevant forms pertaining to a contractor -- the industry standard American Institute of Architects documents, lien waivers, insurance certificates, etc. -- so the accounting staff doesn’t have to search out and attach forms each month.

“We would spend an hour going through a contract to find the forms we needed for billing,” says Heather, the accounting clerk. “Having Sugar in place, it’s all checked off and there with the contract.”

Says Sean: “We keep finding more ways to use Sugar and get more out of it. I think that is the biggest thing. If our team can describe what they need, there’s a way to do it in Sugar.”

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Sean Pinegar
Redglaze Software Engineer

INTEGRATIONS:

- Callinize: caller ID, notes, contacts, recording and history
- DocuSign: electronic signatures
- FeneVision: glass industry ERP for order delivery and tracking
- Google Maps: aerial or street-level views of project locations
- Picasa: image storage
- Pictometry: aerial imagery
- Piwik: website analytics
- Sage 100: ERP used by accounting
- Twilio: phone and SMS messaging

INCREASE THE BOTTOM LINE THROUGH PRODUCTIVITY

Sugar's ability to keep stakeholders updated and lessen the need for meetings has impressed users at Redglaze.

"Not having those big meetings on Friday is a huge time-saver," says Heather, who previously slogged through a mash-up of sticky notes, spreadsheets, Outlook calendars, financial software, and earlier CRM tools in her decade with the company. "Now, we go into Sugar, look up that project, see where they are and Sugar prompts us to do the correct, on time billing."

Tracy Salmonson, finance vice president, recaptured 20 hours per week herself when Sugar helped her eliminate three weekly meetings with her home office and satellite staff. Plus, she saved the time to prepare and review notes after each of the now-cancelled meetings.

Tracy, who quickly adopted Sugar after being with Redglaze Group for 22 years, says: "Now, all I do is look at my Sugar reports and I can tell where we are."

With Sugar, fewer meetings can mean increased productivity, more effective communication across teams – and more time spent on the business of growing their business.

A FUTURE-READY BUSINESS

Sean, the developer, sees no horizon when it comes to what Redglaze can do with Sugar:

"I envision using Sugar not just as a CRM, but as a platform to grow our businesses. We want it to touch every application, every interaction with the customer, and have a central interface for all of our employees to look at and know everything that's going on, regardless of what aspect of the company it touches."

"We probably are seeing a 25 to 30 percent increase in efficiencies; that's how much more work we can manage with the same number of people."

Dean Jessick
Redglaze CEO



CUSTOMIZATIONS

In addition to using Sugar's off-the-shelf functionality, Redglaze developers easily created new modules or customized existing ones to fit their needs, including writing custom portals to provide role-specific access and process management for individuals across the organization.

| CREATED MODULES | CUSTOMIZED MODULES | PORTALS |
|--|--|--|
| <p>Administration</p> <ul style="list-style-type: none"> Created multi-company solution <ul style="list-style-type: none"> Allows all Redglaze companies to be integrated into the system, but users can call up views of a specific company, its accounts and office locations without creating filters Dynamic organizational charts for company or office that can associate a staff member with more than one company or project Added portals that facilitate billing <p>Human Relations</p> <ul style="list-style-type: none"> Employee application process Employees Employee positions Company offices <ul style="list-style-type: none"> Because Redglaze operates in four states, each office must have its own tax information Employee history <ul style="list-style-type: none"> Earnings/deductions Bonuses Time off (auto-calculated, based on configurable tiers that update throughout employment length) Emergency contacts | <p>Quotes</p> <ul style="list-style-type: none"> PDF generation, with company-specific logo and design <p>Opportunities</p> <ul style="list-style-type: none"> Two-way button that sends selected information on all associated projects to opportunities <p>Documents</p> <ul style="list-style-type: none"> Centralized location for all documents; automatically updated when document is revised <p>Projects</p> <ul style="list-style-type: none"> Additive security Configuration-based permissions | <p>Human Resources</p> <ul style="list-style-type: none"> Accepts applications/resumes New hire paperwork Employees can update personal information or add emergency contacts Employees can request time off or view available time <p>Accounting</p> <ul style="list-style-type: none"> Contracts Invoices Purchase orders Work orders Change orders (automatically pulls from work orders) Schedule of values (automatically includes American Institute of Architects standard payment application forms and certification paperwork, and other documents that might be unique to the contract or project) <p>Subcontractor</p> <ul style="list-style-type: none"> Read-only access to project documents Task-tracked, two-way communication with project manager E-signature for purchase orders and invoices Work orders Employee hours Direct photo uploading and storage |

10050 North Wolfe Road | SW2-130
Cupertino, CA 95014
T: 408.454.6900 | F: 408.873.2872

SugarCRM Deutschland GmbH
Erika-Mann-Strasse 53 | 80636 Munich | Germany
T: +49 (0) 89 1 89 17 20 00 | F: +49 (0) 89 1 89 17 21 50
sales-emea@sugarcrm.com

www.sugarcrm.com

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