

# GARDEN REP GROUP, LLC

DATA MIGRATION FROM ACT!  
TO CAPSULE CRM



# COMPANY BACKGROUND

---

Garden Rep Group LLC is an independent representative for 6 companies that do business with garden centers. It also includes hardware and landscape supply, broadening their retail business to various kinds of gardening and large-scale landscape projects.

Located about 80 miles north of New York City, Garden Rep Group has been serving the states of New York, New Jersey, and Eastern Pennsylvania for the last 20 years.

James Curran is the president and owner of Garden Rep Group. In search of using a new CRM for his business, James set out to find the perfect fit. Originally using Act! CRM, James had several reasons to move on. Luckily, an agent from Capsule CRM recommended Trujay to James and thus, the story begins.





# THE PROBLEM

---

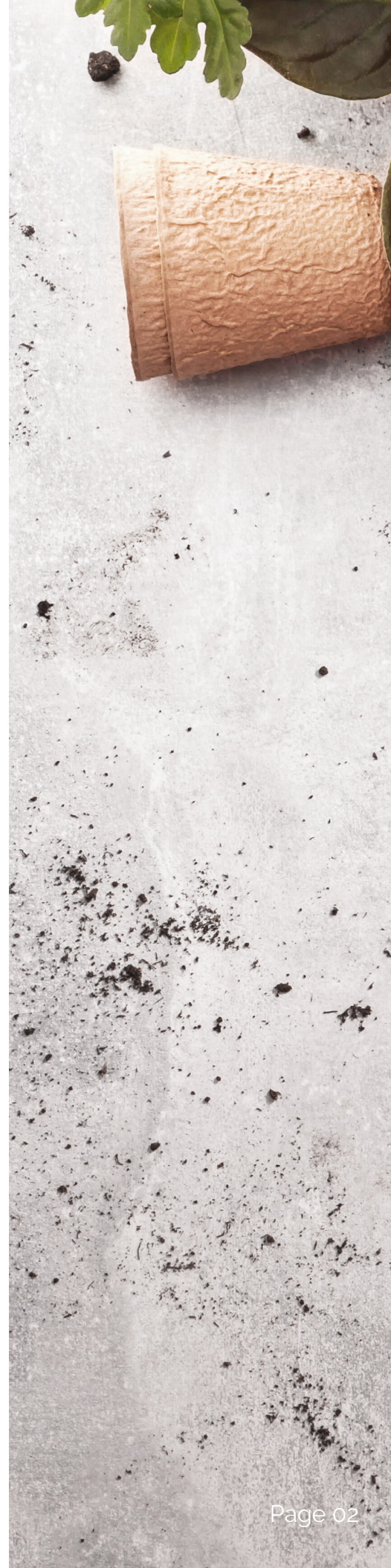
James had been using Act! CRM to conduct business and store all of his client data. Within Act! CRM, several issues were discovered and ongoing.

James found the price range of Act! CRM difficult to budget, as it was "over-serving" his needs. It was simply too expensive going forward with what James needed. The price of hosting was \$1,000 per user. Not only is this costly, but it nearly overdoses a budget with unnecessary sign-ons. James was unable to turn on and off other users during the year. So, even if a user was not using the system, James still had to pay the thousand dollars for each one.

James's basic expense was \$2,000 per year for two users. Recently, Act! CRM had a new software upgrade that would have cost James an additional one-time fee of \$300 per user.

James felt as though Act! CRM had way more "bells and whistles", which can be extremely healthy for some companies. In James's case, however, he was only using a fraction of the features offered by Act! CRM.

Act! CRM is an effective CRM solution for bigger companies, but over-exerts itself when attempting to service companies of smaller sizes. Sometimes, too much of anything is never a good thing. Just because a system has more features doesn't mean it will serve a certain company to its highest degree. Sometimes, less is more, and for James, "it was time to change."





---

“

"There should be a whole bunch of people like me that needs something simpler than their current CRM. I don't know why it took me so long to wake up and realize that I was paying a lot of money for something that I wasn't totally using."

”

---

- James Curran, President & Owner





# THE CHALLENGE

---

While using Act! CRM, James did not have the option to create separate records for Companies. He was using Contact records as both the Company and Contact, rendering secondary contacts related. This was frustrating to the client as well as the Trujay team. Separating the data for both these records was the goal, along with keeping all the data organized and accurate.

Trujay had to create Companies from Contacts and then assign Contacts to the Companies. (Confused yet?) Trujay also had to create related contacts and assign them to the same Company. (How about now?)

Trujay had to deal with CRM functionality differences between Act! CRM and Capsule CRM. Nevertheless, Trujay found the best way to preserve customer related data within the new target system.



# THE SOLUTION

---

Trujay not only migrated Garden Rep Group data from Act! CRM to Capsule CRM, but successfully created Companies from those Contacts and assigned both main and secondary contacts to them. The migration was a success and results were satisfied.

Capsule recommended Trujay to handle the project for the client because this specific migration was exceedingly complicated. Trujay can handle even the most complex data systems and project needs.



"I can't say enough about [my account manager] Lucy. I know English is her second language, but she did a great job of helping me talk through the steps. And even though the first go around was not what I wanted, we were able to pivot and get what I wanted before the entire migration process went through."



- James Curran, President & Owner





# THE IMPACT

“

"I was very satisfied with the results. I think the favorite thing that I experienced was that 'almost' anything was possible as long as I was willing to pay for it. I got just what I wanted and nothing more. [Trujay] made the transition easy."

"I have to give [my account manager] very high marks. She gave me a feeling of comfort all the way through the process."

[Trujay] has clearly come up with a good formula for making these difficult transitions easy on the client."

”

- James Curran, President & Owner,  
Garden Rep Group





[Trujay](#) is the leading CRM data-expert company. We connect marketing and sales automation systems quickly and securely by delivering superior technical savviness and expertise.

Founded in 2018, Trujay applies the best software practices for sales and marketing management. Trujay's consultative approach is custom to each client's unique environment and knows that one size does not fit all.

[IntegrateHQ](#) is the first middleware built to connect any data or system to HubSpot directly, something no other company has ever done before. IntegrateHQ fits every kind of user, as it adapts to all levels of technical experience. Having years of experience with multiple middleware solutions, Trujay has the ultimate HubSpot success factor with IntegrateHQ.

Headquartered in Austin, Texas with offices in the US, Europe, and APAC, Trujay is a global organization serving customers around the world.