

# SugarCRM, Act-On, & Custom Module Help Spinnaker Clarify Data

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## Company Profile

Spinnaker is a supply chain services company that helps clients grow, manage risk, reduce costs, and improve customer service by developing world-class supply chain capabilities. Its services help clients develop the right supply chain strategy for their business challenges and implement the process and technology solutions to improve Demand/Supply Planning, Procurement and Sourcing, Logistics and Warehousing, and Reverse Logistics business performance. Spinnaker offers a unique service delivery model that combines the strength of deeply experienced management and technology consultants with a seasoned team of business process outsourcing (BPO) and 3rd-party logistics (3PL) professionals.

### Company Stats:

- Industry: Management & Technology Consulting, 3PL/3PSP
- Number of Employees: 350
- Headquarters: Houston, TX
- Number of Business Locations: 7

## Business Situation

Spinnaker provides expert supply chain consulting for Fortune 1000 companies. Its business transformation consultants are expected to bring a thorough, holistic approach to converting business challenges into high performing solutions for clients. These processes are complex and detailed, and solutions must be delivered to clients with utmost efficiency. The Spinnaker business development team must have visibility to current customer projects, prospects, opportunities, and new leads to leverage their experience, maximize their influence, and engage their markets.

The management of social selling plays a major role in the success of Spinnaker's client interactions. Without the proper CRM and Marketing Automation, Spinnaker's team was at a distinct disadvantage to pursue their growth plan. Opportunities and trends could not be properly tracked and assessed, creating an inability to strategically rationalize data and pipeline stages. Additionally, legacy systems created duplicate data and misleading data, thus preventing a full view of business trends. The collective challenges made forecasting extremely difficult. Spinnaker needed to stabilize its data environment, cleanse the database of duplicates, and start fresh.

**"We know that client engagement is a key to long-term relationships. Spinnaker needed tools to support our efforts to create this higher level of engagement with current and future clients. We chose wisely with our partners."**

**- Paul Adamson**

## Technical Situation

Outdated legacy applications like Oracle CRM inhibited the usability and flexibility of Spinnaker's data. Oracle did not integrate with the company's other products, so the legacy tool was little more than a rolodex for contacts and a loose collection of notes and follow-up items. Spinnaker decided to put together a team to engage in a full software selection process for a new solution. The team was led by a project manager and included Paul Adamson, Director of Business Development and Marketing. Everyone agreed that it was imperative to identify exactly what aspects were missing to truly find the right fit in a new CRM, and because they were experienced with the previous system, the necessary changes were clear.

The new system needed the ability to track the progression and pace of projects. It would also need to improve on the lagging usability and flexibility while including a solid user community, mobile accessibility, and of course – a good price.

During the selection process, four vendors were narrowed based on these components. "When we considered all weighted metrics, Sugar came out ahead," says Paul.

Price per user and the active user community were a particular draw for the team, but the scale tipped most significantly when employees who used SugarCRM in the past voiced their confidence in the program. When the decision was finally made, Spinnaker turned to TAI to help implement the solution.

## Solution

TAI worked with Spinnaker to implement SugarCRM, as well as some additional features. Spinnaker's processes were very detailed, so TAI built them a specialized add-on module for sales stage progression. This gave Spinnaker a broader perspective of its data. "Functions built into Sugar are helpful, but adding the TAI model to integrate with the databases gives us more visibility. We are able to see when each opportunity moves between stages and calculate the average time spent in those stages to forecast opportunities better," comments Paul.

At the same time they were adopting Sugar, Spinnaker tried to implement a Sales and Marketing Automation solution called CallidusCloud, but they soon realized that CallidusCloud was not going to play well with SugarCRM. TAI suggested the use of Act-On.

"We are pleased with our Act-On marketing automation solution and the great installation and adoption process," says Paul. "Parallel launches of SugarCRM and the CallidusCloud tool was a nightmare. They just didn't play together well and we had to abandon that application. The Act-On recommendation was timely and fortunate. They have been a great partner."

## Benefits

With the implementation of SugarCRM, Spinnaker has successfully removed the duplicate data from its merged systems. SugarCRM is being used by a larger set of the company's users than ever before, even employees who have not traditionally used CRM software.

"Sugar is allowing us to look at the things we care about – our known universe of prospects/accounts/leads and our opportunity progressions. We utilize the lead scoring functions to identify prospects that are ready to engage in meaningful conversations" notes Paul.

Because the system integrates with the TAI add-on and Act-On marketing automation, the visibility and functionality is tenfold. Sugar and Act-On can "talk to each other", which means that Spinnaker's business development team has the necessary channels to build the brand awareness they need. Business development team members are also benefitting from the use of SugarCRM's dashlets to utilize approved templates and create mini campaigns for sales efforts.



**“The whole process of prospect and client management is complex. Utilizing a best-in-class CRM solution like SugarCRM allows Spinnaker to better understand and communicate with our universe of current and future clients.”**

**- Paul Adamson**

development of Customer Relationship Management (CRM) processes and technology solutions. Since 1991, our customized strategies have helped more than 2,000 businesses increase sales, boost productivity, and improve profitability.

We work with companies globally on consulting, project management, marketing automation, sales automation, customer service and support, field service, call center optimization, analytics, and mobile and social solutions.

Our expertise spans a wide-range of markets including government industries, financial services, property, healthcare, manufacturing, and construction.

Paul adds, “The CRM was the key to the introduction of a new Marketing Automation Software solution that allows us to smartly manage Social Selling through nurture campaigns, and build stickiness with our current and future clients.”

TAI continues to provide Spinnaker with technical support as team members fully adopt their new CRM and Marketing Automation systems.

## **About Technology Advisors**

Technology Advisors (TAI) is a global business and technology consulting company specializing in the