Putting the "Order" Back in "Order Management": C&M Conveyor's Success Story

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Company Profile

C&M Conveyor is a leading supplier to the corrugated box industry, offering automatic chain transfer, strapper console, and moveable machine infeed and transfer car conveyors. C&M Conveyor also serves other industry segments and provides the folding carton industry with roll loading, mesh belt and stripping station conveyors, as well as dolly, release and catch conveyors. C&M Conveyor also offers replacement parts for conveyor systems, preventive maintenance, and contract services. C&M Conveyor prides themselves on delivering safe and efficient solutions to their clients.

Company Stats:

- 140 employees; 40 on SugarCRM
- Leader in corrugated logistics
- Design safety into every deal

Business Situation

When Tom Brentlinger - Project Owner, C&M Conveyor - embarked on his Customer Relationship Management (CRM) journey, he faced a mandate to use C&M's existing ERP application as a CRM. What's worse, he was advised to retrofit the sales process instead of the software. But Tom knew better; he wanted the sales team to succeed and understood that with projects like this, you only get one shot for your team to truly adopt all the changes that come with a new product and a new process. That's precisely why Tom chose SugarCRM and Technology Advisors Inc. (TAI) as C&M's CRM solution.

> **"The team wanted to change the people to the system instead of the other way around...**
>
> **...I didn't want my name associated with something that wouldn't work; we needed real CRM."**
>
> **- Tom Bretlinger**

Since C&M Conveyor's sales team didn't have a CRM, they didn't have a common practice. Management knew what deals closed, but lacked reliable visibility in to the pipeline. This made it difficult to forecast and caused tension during board meetings.

Additionally, a large part of C&M's value proposition surrounds the fact that they install without disrupting their clients' service. This means that any problems that occur during installation must be resolved before the next business day. Prior to SugarCRM, cross-departmental communication, and subsequently the resolution of such problems, was a slow and convoluted process.

Implementing a system that improved visibility and accountability in this regard was a top priority.

Project Opening Desire: C&M Conveyor asked TAI to implement Sugar OnDemand because they wanted their new tool ready and operational in time for their annual sales meeting.

Technical Situation

Since C&M's sales team all work remotely, there was no reason to waste resources on an in-house, locally-hosted solution. Tom entered his CRM evaluation process with a hosted solution in mind. He believed this would allow him to get up and running quickly.

C&M wasn't migrating from a formal CRM, but they still wanted to import data from the various sources the team leveraged including an ERP, a legacy quoting system, and the sales team's personal rolodex. With all the data repositories identified, TAI assessed the import options, and recommended the most efficient and economical options for C&M.

The C&M sales team weren't the most computer savvy bunch. For any solution to succeed, it needed to be easy to use, mobile ready, and - thanks to TAI - come with some rockstar training. Additionally, in regards to usability, Tom realized that no tool would completely map to his data right out of the box. So, he was keen to find a flexible solution that provided the tools necessary to configure a modified solution in a supported way.

"SugarCRM gave us hosting independence."

- Tom Bretlinger

Project Eye Opener: SugarCRM's Studio feature allowed C&M to tailor the solution to their terminology and even let them expand the scope beyond sales by enabling Tom and his team to customize a module specifically suited to their installation workflow.

Solution

A client in a hurry and on a budget is nothing new for the TAI team. TAI worked to get C&M's data imported and leveraged the data cleansing service, powered by Dun & Bradstreet, to improve the integrity of the C&M database.

With all the data safe and sound inside Sugar, Tom turned his attention to integrating C&M's legacy quoting tool. As with many legacy systems, this tool had closed code that couldn't be reworked. The TAI team took the time to understand Tom's quoting needs, and helped deliver the solution he needed.

"I chose Sugar because of its overwhelming value proposition."

- Tom Bretlinger

But C&M didn't stop there. The team crafted a module and automated workflows for their field installation team to use should trouble arise.

Issues are now communicated in real time to all necessary parties and problems are solved well within the installation maintenance window.

People often forget what a crucial role support plays in a solution's success, but not in this case. TAI helped Tom and team resolve all his challenges and ensure the team could carry on without impediment.

Benefits

Today, C&M's salespeople maintain up-to-date records in SugarCRM. Management and the sales team are no longer wasting hours compiling reports each week. Instead, the data is available 24/7. Reps save time by entering notes and updating opportunities from the road, right on their phone.

Soon, the sales team can look forward to more action-packed trips thanks to the visual trip planning delivered by TAI's Map to Lead dashlet.

> **"I used to sell software for a living and I'm used to people saying '[the application] can do this/that', but inside the Sugar product itself, we are getting everything done we wanted to get done."**
>
> **- Tom Bretlinger**

With 25 of his 40 users accessing Sugar daily, Tom knows the data inside Sugar is up-to-date and actionable. Tom and his boss now enjoy a clear picture of their "universe."

With the team all speaking the same language. Thanks to a thoughtfully configured opportunities module, sales meetings have never gone so smoothly.

The 15 casual users, Tom shared, are mostly the support and installation team. They only need to use it when reporting problems and therefore don't need to log in every day. That's okay by Tom, since it means things are usually running smoothly. All in all, Tom described the implementation as very successful and well-adopted.

When asked about his relationship with TAI, Tom had this to say:

> **"Support is great. I send mission critical issues to TAI [instead of SugarCRM directly] because they have such a great understanding of the product."**

At the end of the day, Tom and the entire C&M Conveyor team enjoy the synergy and streamlined processes SugarCRM has provided them. Everyone is satisfied with the solution and the initial decision to work with TAI. C&M Conveyor looks forward to the continual improvements to come.