EXILE Technologies uses SugarCRM to Support Its Customers and Drive Sales

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Company Profile

EXILE Technologies is a leading manufacturer of professional-quality thermal imaging equipment, film products, and direct-to-screen devices. Their products provide unique, reliable, affordable, and chemistry-free imaging solutions to an array of graphic pre-press and oil and gas industries that require large-format (12- to 54-inch wide) images with resolutions ranging from 200 to 1,200 dpi.

Company Stats:

- Industry: Printing
- Headquarters: Houston, TX and Bedfordshire, England
- Number of Employees: 40+; 15 in sales and support
- Subsidiary of Geospace Technologies

Business Situation

EXILE Technologies had been burned by its previous attempts to purchase a Customer Relationship Management (CRM) system and consequently started this journey with no more than a few homegrown systems and no real database. Prior attempts were riddled with false promises, reversed directions, and - in the words of Lance Heap, a Vice President at EXILE - 'vaporware.' But through it all, Lance continued to believe in the merits of CRM, and the value it would deliver to his sales and support organizations.

"Lance sees CRM as a critical brick on the road to their long-term success...finding and delivering one that delivers the ongoing flexibility they need to adapt alongside their business is crucial."

- Valerie Parker, TAI Consultant

In the long term, EXILE Technologies plans to grow, so their product will need to evolve as well. The single view that CRM promises, Lance believes, will provide the necessary platform to capture the data they need to communicate customer desires to their engineering teams. Such insight will be made possible by capitalizing on their short-term goal: provide a unified database that incorporates realtime data from their other mission-critical systems for their teams to track customer behavior.

PROJECT OPENING DESIRE: EXILE Technologies spent a great deal of time researching not just a solution, but a business partner, because they needed a tight integration between the CRM and their other business-critical systems, like J D Edwards.

Technical Situation

Much of EXILE's accounting process relies on a legacy JD Edwards application and only three out of the four CRM solutions they evaluated came equipped with a standard out-of-the-box integration. To truly achieve their vision – to enable the support staff to satisfy their customers' demands and to empower the sales team to cross and upsell clients appropriately – any solution they obtained needed to integrate with this ordering system. Technology Advisors, Inc. (TAI) was the only partner of the several vetted with a strong history and experience in integrating ERP solutions.

On the process side, there wasn't much to speak of. The EXILE support team operated without any formal case management system, using only email and voicemails to manage customer requests. Not only did this lack of repository create inconsistencies in the support organization, but it prevented sales from having the perspective needed to assess the health of existing accounts. Lance explained they "all do it their own way," and while he's okay with that in principle, it makes managing them quite difficult. They needed a solution that would provide visibility without stifling the creativity of each individual on the EXILE sales team.

PROJECT EYE OPENER: The EXILE Technologies team embraced the idea of a new process. Particularly the support team, who felt they'd be more effective and better able to cover for each other with a proper case system in place.

Solution

Technology Advisors listened to the challenges facing EXILE Technologies, and delivered their sales and support teams a solution uniquely configured to meet their requirements. In addition to the highly-coveted integration with their accounting system (J D Edwards), the TAI team implemented several modules in SugarCRM Professional. The Cases, Leads, Quotes, and Opportunities modules were tweaked and tailored while several more – including Dealers, Notes, and Accounts – were customized or created for the EXILE solution.

The new support process uses the Cases module to track customer inquiries. Rather than trying to change their customers' behavior, however, EXILE chose to automatically create cases submitted through traditional channels including voicemail and email.

The EXILE sales team is an eclectic bunch; everyone has a different style, but they are all successful in their own way. SugarCRM was configured to accommodate these differences. As a result, the team has adopted the system at an extraordinary rate – 95% of the team uses the tool with enthusiasm and positive feedback. This is because they see value in the updated paradigm.

> **"Due to the complex nature of their migration, we completed their import on a separate server which allowed them to perform more thorough deduplication."**
>
> **- Valerie Parker, TAI Consultant**

Segmenting prospects from customers and leads from actual opportunities, coupled with the additional visibility provided by the orders integration, allows the team to really focus their efforts and has fundamentally improved the way prospecting is performed.

PROJECT GEEK SPEAK: "I learned that there's an internal ID embedded in emails. When you reply or forward a message it's this GUID that keeps the thread together…" said Valerie Parker, EXILE Technologies' Project Manager at TAI. "This discovery allowed us to overcome an issue not covered in the original requirements document. EXILE customers occasionally corrupted the subject line of case replies and the emails weren't associating properly, but we worked with the team and implemented a solid solution."

Benefits

Today, the EXILE support team successfully collaborates on cases. When one or two of them are on-site with a customer, the remaining team is now able to jump in and assist because they have all the information right at their fingertips.

Since the sales organization adopted the solution so quickly, call logs and meeting history are now readily available inside SugarCRM, allowing Lance to enjoy fewer emails and phone calls. Instead, he focuses his new found time speaking with customers and supporting the staff. While the sales team, having everything they need at their fingertips, spends more time selling and less time jumping from system to system.

"They are professional; they accommodated our inexperience. While [my colleague] and I were dedicated and project managed, we were novices. TAI was patient and provided us some time to climb the learning curve."

- Lance Heap

The combination of these improvements leaves Lance hopeful. He expects the process to continue to improve over time and ultimately translate into the revenue growth they seek. "CRM was an important first step," said Lance, who also shared the belief that, "now that they've taken [this step] they are free to focus on the future."

"The whole process - from lead to account - has given sales a way to look at new and potential business differently."

- Lance Heap

It took four years of begging before upper management supported buying a new CRM and another year to find the right one. With SugarCRM and Technology Advisors now on their side, EXILE Technologies has its feet firmly planted on the path to growth and success.