LabSource Uses SugarCRM to Improve Sales Team Communication

Table of Contents

Company Profile

Founded in 1989, LabSource Inc. is a distributor of scientific equipment, laboratory supplies, and personal safety & protective apparel to the life science, pharmaceutical, industrial, government, and university markets. Their catalog of over 800,000 products is made possible because of the relationships they've fostered with upwards of 3,500 manufacturers; this allows LabSource to bring the most necessary and cutting edge products to their clients, right when they need them.

Company Stats:
- 26 employees; 15 in sales and marketing and customer service
- Exceptional service is their top priority
- Welcomes customers' hard-to-find products; work hard to find solutions for everyone's needs

Business Situation

Prior to their implementation of SugarCRM, LabSource had several legacy customer relationship management (CRM) systems in place; each of the subsidiaries had implemented its own instance of either Telemagic or Skyline. LabSource sells under 3-5 brand names at any given time, and plans to increase that number as it pursues new, more targeted markets going forward. When Pete Nelson, the VP of Sales & Marketing, joined LabSource, he quickly realized that all these siloed data sources were causing major problems in their sales and customer service organizations; salesmen from different brands were competing with each other.

> **"Before Sugar, there was animosity between the [sales] divisions because they were discounting over each other and we were blind to the problem."**
>
> **- Pete Nelson**

Pete wanted to break this pattern, so he applied his previous experience with more modern, cloud-based CRM applications to his new role. Facing the myriad of CRMs on the market, Pete - and LabSource - turned to Technology Advisors, Inc. (TAI) for guidance. With the short-term goal of gaining accountability across their sales organizations, and the more long-term interest of creating a scalable paradigm for future product and brand launches, TAI recommended SugarCRM to satisfy LabSource's needs.

PROJECT OPENING DESIRE: LabSource engaged TAI to implement Sugar OnDemand because it needed a cost-effective, scalable solution that they could use to create accountability within the sales team.

Technical Situation

Coming from so many disparate systems created a challenge for LabSource. Their data resided in different formats, different databases, with different schemas, and different standards. For all intents and purposes, they faced not a single migration effort, but four separate migrations. To make matters even trickier, the systems from which this data was to be pulled were so old and customized they lacked any formal export functionality.

LabSource takes a highly technical and variegated catalog of products to market with a sales organization comprised of salespeople, not scientists. Consequently, they required a tool that would help the team speak their customers' language. This meant SugarCRM would need to help them profile their prospects in such a manner as to assist sales agents in selecting and suggesting solutions to their clients.

> **"Communication was crucial during this extended project...status updates from both sides allowed the data import to go smoothly."**
>
> **- Lan Luo**

With the bulk of their business coming from telesales and catalog sales, LabSource needed a system that broke down barriers to data entry. They could not afford to implement "shelf-ware" because without data, they would have no insight.

PROJECT EYE OPENER: Merging the methodologies from several sales teams can be a challenge, but the TAI team helped LabSource select the data points, features, and metrics that would best support their goal of expanding market share without disrupting the book of business currently in place. The migration was to be performed during LabSource's busy season, so dropping the ball was not an option!

Solution

"Right from the beginning [TAI] sought to understand our business before making a recommendation. Suggesting Sugar wasn't a 'cookie cutter' solution."

- Pete Nelson

Technology Advisors understood the challenges of merging not just several different CRMs, but the several different sales methodologies developed around them, into a single database; so they leveraged their experience to develop and deliver ascalable solution that promised to grow withLabSource for years to come. During deployment, Lan standardized the LabSource teams on a "best of" SFA solution consisting of four modules: accounts, opportunities, leads, and contacts.

Today, sales people from all of LabSource's different divisions use SugarCRM to collaborate effectively. Features like dashboards, filtered search, and data stream allow members of different departments to gain insight into their accounts to make more effective, targeted sales decisions. And since making changes to SugarCRM is a lot easier than it was with LabSource's old systems, LabSource can continue to adapt its processes and practices as quickly as the market demands.

PROJECT GEEK SPEAK: LabSource is looking to grow their revenue and margins; a focused strategy will be the linchpin to that success. "Which is why I recommended they focus on porting over only their most relevant data," said Lan. "By focusing on only the data that would help them achieve their goals, we were able to save the LabSource team time, money, and headache."

Benefits

Since implementing SugarCRM, Pete's team no longer steps on each other's toes. He's able to successfully manage several independent sales organizations, and develop their respective brands without sacrificing visibility or insight. The reduction of animosity freed the management team to focus on figuring out what works and replicating it.

Pete also shared that he believes the improved insight into the customer base and the added detail of the precise ways customers apply their products allows his sales team to deliver better solutions that include the latest technology to prospects more quickly and effectively than their competition.

Today the LabSource sales team has the tools they require to "speak geek" and keep up-to-date with the multitude of suppliers; they can now focus on the sale instead of the science. When asked about LabSource's relationship with TAI, Pete had this to say:

"I would absolutely work with TAI again. Their patience and guidance allowed us to successfully deploy, even during our busy season."

Because of the work with TAI and the implementation of Sugar, Pete is confident that his team has the tools necessary to launch additional brands associated with the LabSource family and subsequently increase revenue as planned.

About Technology Advisors

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