

CASE STUDY:

Searchmetrics Doubles Number of Users by Switching to SugarCRM

How Searchmetrics Uses Sugar to Increase User Adoption and Improve Campaign Performance.



searchmetrics

Searchmetrics
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Searchmetrics provides an SEO platform with the tools and data necessary to help their customers maximize their online performance. Users of Searchmetrics identify new business opportunities, learn what content their target market is engaging with, and receive content suggestions that are proven to increase conversion. Searchmetrics used Salesforce for over three years before switching to a customized instance of Sugar. Since switching platforms, Searchmetrics has increased user adoption across the company and has grown their user base from 70 to 200 employees.

Business Challenges

Searchmetrics adopted Salesforce to give their sales reps a tool to track their sales pipelines. After using Salesforce for three years, the management team found themselves measuring little return on their investment in a CRM platform. User adoption was low and this resulted in a lack of reliable data and poor business analytics. They felt they were spending money on a tool that wasn't benefiting the organization because they lacked a solid CRM strategy. The management team decided it was time to make some internal changes in order to have a successful CRM deployment.



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The Path to Success

Searchmetrics began an evaluation of their current business goals and how their CRM could help achieve them. They started by evaluating less expensive alternatives to Salesforce. Two executives at Searchmetrics had used Sugar before and believed it would be a good fit for the organization because of its price and flexibility. They launched Sugar in 2013, and then began to further evaluate their CRM strategy in order to address issues of low user adoption and dysfunctional reporting they had experienced with Salesforce. "We had a lack of work-flow and understanding of what we wanted to achieve from the CRM," said Christopher Simmons, Global CRM Manager & Operations at Searchmetrics. "We had to sit down and really decide what we wanted to get out of our CRM and then decide what strategy would get us there." In order to optimize their strategy and build a customized Sugar instance that fit their unique business model, Searchmetrics began working with W-Systems in 2014.



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Success Factors

Strong User Adoption

Searchmetrics implemented three main tactics to improve user adoption. First, they created a team of champion users made up of one member from each department. These users are responsible for answering questions, responding to workflow requests, and boosting adoption within their respective teams. This prevents the Sugar admin from having a workload that is too large.

Second, they empowered these champion users with tools to create short training videos which they upload to an internal video library for users to reference. Third, they created a required training program called Searchmetrics Academy for all new employees. Together these three tactics formed a strategy which boosted user adoption of Sugar across the organization.

Ability to Scale

By switching from Salesforce, a tool that was costing Searchmetrics three times what Sugar costs, the team has more flexibility in their budget to add additional CRM users. Since adopting Sugar, Searchmetrics has increased their user base by 285%. "I am really proud to say we have grown to 200 users today," said Simmons. "When we adopted Sugar, we had only 70 users. And now predominantly every-one in our company has access and they are all actually using it every day."

Customized to their Needs

The flexibility of the Sugar platform has allowed Search Metrics to customize their CRM to their business needs rather than being forced to adapt to a tool with set relationships and architecture. Searchmetrics' Sugar instance now has several custom modules and features. "We worked with people who really knew what we could get out of the tool," said Simmons. "Because of that, we are in a cool spot where we can actually utilize our CRM." Customizations to their Sugar instance include:

- Custom Forecasting Module, which uses a complex weighted forecasting formula and integrates with Teams to roll-up forecasts for each sales manager.
- Custom Contracts Module, which automatically creates contracts and handles renewals, as well as gives management visibility into opportunity, cross-sell, and up-sell metrics.
- Quick Call Creator customization, which lets reps create a call, note, and task record from the side panel of Sugar while viewing an Account or Contact record.

Ability to Integrate

Searchmetrics integrated their Sugar instance with both Sage and Marketo. Their integration with Sage, a finance tool, allows their entire company to have visibility into invoices. Now the support team can see if there is upgrade potential for certain accounts based on their past payment history. The integration with Marketo, a marketing automation platform, has given the entire company visibility into detailed lead activity. This allows the marketing team to track their impact on ROI and allows the sales team to gauge leads using lead scoring, resulting in more warm intros and less cold calls.

More Targeted Campaigns

Today, Searchmetrics finds they have more visibility into campaign performance. Whether it's a conference they attended or an email campaign, Searchmetrics now has more metrics on how each campaign performs and therefore can increase the impact of future campaigns. "In the past, we spent a lot of money on events and made a lot of cold calls," said Simmons. "Today we can measure how well we perform at a convention and measure conversion ratios for each campaign. So we can be more efficient because we know who we should be targeting."



"We work with W-Systems because of the trust, the experience, and the customer service. We need someone who is all about us, and W-Systems provides that."

Christopher Simmons, Global CRM Manager & Operations