

CASE STUDY:

# USAFact Invests in a CRM to Drive Business Efficiency & Profitability

W-Systems Helps USAFact Revamp Business Model and CRM System.



USAFact  
usafactinc.com



In a down economy, rather than cut costs across the board, USAFact invested in its CRM system as a means of bringing the company back into profitability.

## Here's How They Did It

USAFact — an internet-based pre-employment screening company — was facing severe business challenges as a result of the recent economic downturn. As hiring slowed to a crawl, order rates for background screen services plummeted and so did USAFact's financial results. USAFact needed to revamp its business model and figure out how to deliver its existing services more cost-effectively and how to develop new, innovative products that would fuel future growth.

USAFact had already implemented SugarCRM and was using it to track sales activity. When new management was brought into the company to turn things around, they focused immediately on the CRM system and what it could do to help drive business efficiency and growth.

Rather than cut costs across the board, USAFact invested in its CRM system as a means of bringing the company back into profitability. W-Systems, as USAFact's SugarCRM business partner and advisor, played a critical role in this turnaround effort.

## The Path to Success

USAFact quickly identified areas for business improvement that centered around the use of the CRM system. These included:

### Faster Price Quotes

USAFact was taking days to generate price quotes for prospective new customers, often losing business to more responsive competitors. To remedy this they implemented the SugarCRM quote module, and built custom quote templates that automated and accelerated the quote generation process. Customers now receive quotes in hours rather than days and sales have increased as a result.

### Simplification of the CRM

Surveying users, USAFact learned that their staff was confused by the complexity of their CRM system. To remedy this, they simplified the system, turning off unused modules, removing unused data fields, and cleaning-up screen layouts. User adoption soared.

### Case Management

USAFact had no visibility into customer problems that could jeopardize future sales and overall satisfaction. Their existing SugarCRM system had a case management module, but it was not being used. USAFact trained users on the cases module and immediately saw an improvement in problem resolution and overall customer satisfaction. And as a bonus, having customer issues logged in the CRM added significant value to the CRM system and enhanced user adoption.



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### Data Organization and Security

USAFact had not made use of Sugar-CRM “groups” and “roles” capabilities to customize the user experience, secure data, and organize the presentation of information in meaningful ways. Implementing groups and roles drove additional user adoption and system value.

### Dashboards

By equipping each CRM system user with a personalized dashboard containing information most important to that employee, users gained great visibility into overall business operations.



“W-Systems has always done a tremendous job of delivering on time and on budget.”

Matt Davidson, CEO

### Success Factors

USAFact’s new management team had extensive experience with CRM systems and knew going into this turnaround project that a properly configured and deployed CRM could make life great and drive better business results. They focused on several key success factors, each of which made a huge impact on the overall success of the project and a big impact on the financial results of the business.

#### Focus On Users

USAFact took the time to understand the needs of CRM system users. As important, they also explained to users why the system was being expanded and how it was to be used to drive business success.

#### Ubiquitous Use

USAFact expanded its CRM license count to include everyone in the company. With everyone using the system, CRM became the “go-to” resource to provide services to customers. This reinforced system use and drove greater buy-in from users.

Want to see how a CRM system, properly deployed and accessible by everyone in your company, can become the firms’ most important source of business information to drive growth and success? Call W-Systems and we’ll show you how to do it.