

CASE STUDY:

Streamlining Lead Management with Sugar

VPI streamlines lead management and delivers outstanding customer experience with SugarCRM and Pardot Integration.



VPI - Voice Print International
vpi-corp.com



Business Issue

After 15 years in business, VPI found itself with information spread across multiple legacy systems including a GoldMine CRM application. This had several negative impacts on VPI's operations, including the inability to enforce a standard sales process or generate accurate long-term forecasts. There was also no integration between GoldMine and the VPI website. VPI wanted a web-based system that could support the needs of the entire company.

Requirements

- Eliminate legacy applications
- Unify all departments on a single platform
- Simplify reporting
- Integrate with the company website

The Solution: Sugar Professional

After considering various CRM solutions, VPI chose Sugar since it met all VPI's requirements; plus, it offered easy customization and excellent price to value. VPI also made sure to integrate Sugar with the Pardot marketing automation solution. With the Pardot integration, visitors to the VPI website automatically appear as leads in Sugar. VPI employees also use Sugar's InsideView integration to reach key decision makers at prospect companies.

Business Benefits

- Supports VPI's reputation for delivering an outstanding customer experience
- Provides real-time customer information on demand, even while traveling
- Delivers personalized views into data such as sales opportunities, customer activity, and maintenance status
- Simplifies and automates formerly manual, paper-based processes
- Increases the accuracy of sales forecasting
- Tracks the ROI of marketing campaigns

Results

- Reduced manual lead entry by nearly 100 percent
- Increased time for face-to-face customer contact by 30 percent



SugarCRM is the tool behind the scenes that helps us to maintain exceptional relationships with our customers.

Patrick Botz, Head of Marketing