

# B2V

B2V Group Develops Customer Engagement Strategy With SugarCRM®



# Sugar Partner CARRENET Provides Centralized Customer Data and Automated Email Marketing

Social welfare group B2V selected SugarCRM to centralize customer data and automate its system for contacting potential clients. B2V engaged Sugar partner CARRENET to provide implementation services. Using Sugar, B2V has gained a cross-department view of its client portfolio, eliminating duplication of client contacts. With a completely automated process, Sugar makes it possible to create and launch email campaigns driven by the group's sales goals. In addition, new Sugar modules identify B2V clients that are connected through social networks, which helps sales define and implement prospecting plans.

## Business Challenges

B2V is a social welfare group whose activity revolves around three main areas: retirement, personal protection and health insurance. It manages 2 billion € in annual revenue for 960,000 workers and pensioners and 30,000 businesses.

As part of B2V's strategy for attracting new clients, the group combined its sales and marketing departments into a development department. This reorganization required the group to centralize client relations and incorporate a CRM tool. Its CRM solution would need to provide a single file that would be updated daily and include every client and prospect from each business segment. It also

wanted to automate the data entry process, reducing the time to update data for more than one million clients and prospects.

B2V was looking for a scalable solution that could be installed quickly at an affordable cost. "We needed a turnkey solution. But as a social welfare group, we also faced strong budgetary constraints," admits François Grégoire, director of studies and development for the B2V Group.

## The Solution: Sugar Professional

The B2V group adopted Sugar and engaged Sugar partner CARRENET for its expertise as an implementation partner. The group chose Sugar for its flexibility and its new Sugar solution was operational in just three months.

Although Sugar was originally intended to be used only by B2V's development department, it is now also available to the group's retirement, personal protection and social assistance departments. It's also connected to the B2V Retirement and Personal Protection/Health Insurance software packages. This integration makes it possible to extract data from companies and potential clients and make it available to Sugar, automating data import and ensuring that information is constantly updated.

“ Using Sugar across all departments has helped B2V reach its goals of ensuring customer loyalty and satisfaction. ”

François Grégoire  
Director of Studies and Developments  
B2V Group

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## Business Benefits

Project management now has significant control over solution features including client fields, custom screens and workflows, making employees more autonomous and efficient. By centralizing data via Sugar, B2V has gained a cross-department view of its client portfolio, enabling all employees to see contacts made by different units. This, plus improved organization via Sugar, ensures that client contacts are not duplicated across departments. Moreover, better visibility into scheduled appointments improves management of internal resources.

The Sugar solution has also made it possible for B2V to automate its system for contacting potential clients. Sugar allows for targeted prospecting of clients over set periods of time—three months, six months, etc. Emails are sent every day without human intervention. This process is fully automated and makes it possible to create and launch email campaigns driven by the group's sales goals. In addition, new Sugar modules identify B2V clients that are connected in some way, such as through social networks, which helps sales define and implement prospecting plans.

"Using Sugar across all departments has helped B2V reach its goals of ensuring customer loyalty and satisfaction," concludes François Grégoire, director of studies and developments for B2V Group.

## About B2V

B2V is a social welfare group whose activity revolves around three main areas: retirement, personal protection and health insurance. It manages 2 billion € of annual revenue for 960,000 individuals (workers and pensioners) and 30,000 businesses. A leader in the insurance industry, B2V ensures the welfare of all the employees and retirees within this part of the industry.

A professional reference group for private education, it manages the retirement of more than a third of teachers and half of non-teaching staff. B2V is also very present in the inter-professional field, helping small and large companies alike. B2V offers social activities suited to all its clients.

## About CARRENET

Dedicated to CRM since its founding in 2004, CARRENET provides consulting, integration and support services for SME clients and key accounts in France and internationally. The rapid, long-term success of its CRM projects helps CARRENET customers optimize their efforts in attracting and maintaining customers, creating a real return on their investment. CARRENET currently has 80 active clients, with 2,800 users of its solutions.



## Company Profile

**Headquarters:**  
Paris, France

**Founded:** 1972

**Company Description:**  
B2V is a social welfare group whose activity revolves around three main areas: retirement, personal protection and health insurance.

**Website:**  
[www.b2v.fr](http://www.b2v.fr)

**Solution:**  
Sugar Professional

**Solution Partner:**  
CARRENET

## SugarCRM

Customer relationship management (CRM) software for business. In the cloud, online, on-demand, or on-site, the best sales, email, and mobile CRM integration.

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