SUGARCRM

OmniMed Financial & Insurance

OmniMed Financial & Insurance Boosts Lead
Conversion With SugarCRM®

OmniMed
Financial & Insurance

Customizations by Sugar Partner BrainSell Drive Increase in Sales Leads

OmniMed Financial & Insurance, which offers insurance and investment services to physicians and other professionals, implemented Sugar to market the firm's services, track leads and opportunities, and improve follow up with customers. After enlisting the assistance of Sugar partner BrainSell to customize the solution and integrate it with OmniMed's Wordpress based website, as well as with inBOX25, OmniMed increased its lead generation and conversion while reducing the time it takes to do tasks such as building a newsletter, following up with opportunities, and reaching out to existing clients to ensure that the company maintains the highest level of service.

Business Challenges

As OmniMed Financial & Insurance founder Joe Capone recalls, his first information management tools were Post-it notes, from which he soon graduated to Excel spreadsheets, ACT, and a few others that he knew were not right for OmniMed Financial & Insurance from the get-go. "When you start out, you don't really have any data," says Capone. "As you grow, managing information soon becomes an organizational issue."

Capone knew he needed a software solution to help him market his services, track leads and opportunities, and follow up with customers. "I'm very technical with computers and

software," Capone explains. "I've tried a lot of applications. And I knew what I needed was CRM. The question was which one?"

The Solution: Sugar Professional

Capone looked at Zoho and Salesforce, but quickly realized that he preferred an open source solution that could grow with and adapt to his business. He also wanted access to a developer and partner community that could help him build a custom solution. "I found Sugar and then I found a really great partner in BrainSell," recalls Capone. "Kevin Cook over at BrainSell is a real problem solver." For example, Cook helped Capone develop formulas that enabled him to track and maintain contact with doctors as they progressed through their residencies—and market to them when they were most receptive, in their third or fourth year.

In addition to customization, it was also very important to Capone that he could integrate his other systems with Sugar. "The problem with these out-of-the-box CRMs is that most businesses don't come out of a box," he observes. "And if you can't tie everything together, it's just another set of roadblocks. Growing and staying competitive in today's non-stop business environment is difficult. With the proper infrastructure, rooted

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>
> Joe Capone
> Founder
> OmniMed Financial & Insurance

in a great CRM, it all becomes that much easier, while of course, still difficult." A case in point: BrainSell's integration of Sugar with inBOX25. "With inBOX25 and Sugar, I can automatically stay on top of policy anniversary dates," continues Capone. "It's an ideal opportunity to keep in touch as clients expand their practices, get married, and have kids. They need more financial products. And we want them to be thinking of us." Likewise, the Sugar integration with MailChimp streamlines and automates the process of creating and distributing OmniMed's monthly newsletter.

Business Benefits

Capone was using Sugar productively in only three weeks from activating OmniMed's account and has since experienced numerous benefits. OmniMed's monthly newsletter, which had taken approximately five hours to package and get out to a sorted list, now takes only a few minutes. The company also generates and converts more leads. "With Sugar, I'm generating more leads due to the integration that we have with our website. Consumers are doing more and more through the web and this, of course, includes busy physicians and dentists that are looking to find quality disability insurance," Capone notes with enthusiasm. "I'm converting more leads into closed business. And, I'm more organized all around. We have also brought on a partner in the past 12 months in order to help with scaling the business to greater levels. We are now working in all 50 states. Rick and I are busy running the business. Through integrating our

critical systems, the entire team at OmniMed is able to be on the same page, at all times. With SugarCRM, we are in a much better position and we see great things ahead for our clients. We are proud of what we have built in a company and the market is responding. We owe a special thanks to so many of our technology partners, with Sugar being at the top of the list!"

In the past, Capone struggled to keep track of the important milestones and account review opportunities for each of his clients. As the company grew, these challenges simply increased. With Sugar, data organization and management is no longer a barrier to growth, and he's well prepared to take advantage of every customer touch point. "Sugar helps me grow my business and keep my clients satisfied," concludes Capone. "I can operate more professionally. Basically, Sugar is an extension of my brain."

Company Profile

Headquarters:
Needham, Massachusetts

Founded: 2007

Company Description:
OmniMed Financial & Insurance provides various insurance and investment related services to physicians, dentists, and healthcare professionals throughout the country.

Website:
www.omnimedfinancial.com

Solution:
Sugar Professional

Solution Partner:
BrainSell

About OmniMed Financial & Insurance

OmniMed Financial & Insurance helps physicians, dentists, business owners, and other professionals plan for today and tomorrow, managing current business and personal finances in the most tax-effective fashion possible while implementing plans to ensure that long-term goals are attained.

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About BrainSell

BrainSell is a business solutions company that is dedicated to helping businesses grow, create a delighted customer base and achieve grand success. BrainSell is a SugarCRM Gold Partner and also provides comprehensive ERP, CRM, and marketing automation solutions and services, including training, implementation and software development. Founded in 1994 and headquartered in Topsfield, Massachusetts, BrainSell continues to grow in product knowledge and offerings. Visit www.brainsell.net for more information or email info@brainsell.net.

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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