

# TIM Group

TIM Group Supports Rapid Growth Across Three Continents With SugarCRM®

# Financial Technology Firm Uses Sugar to Track Its Expanding International Client Base

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TIM Group identifies opportunities for investors to outperform the market. With SugarCRM, the company can now effectively manage the rapid growth of a highly demanding client base that spans three continents. In addition, Sugar allows sales pipeline and customer data to be fully transparent across the company, allowing TIM Group to forecast accurately and plan customer interaction accordingly.

## Business Challenges

In 2008, TIM Group was experiencing rapid expansion of its client base – hedge funds, funds of hedge funds (FoHFs), and traditional asset managers – expanding 40 to 50 percent year-on-year. From a relatively small, London-based firm, TIM Group has grown into a global organisation with offices in the US and Asia. The original team was accustomed to performing a variety of roles and to retaining client information on an individual basis, using personal spreadsheets and Rolodexes, shared drives, and Microsoft Outlook. The firm began to realise it needed a more adequate solution to manage its rapidly expanding number of sales pipelines and opportunities across three continents and timelines.

TIM Group required a centralised solution that could be hosted on-site to manage its contacts and clients. The solution also needed to enable TIM Group to augment the sales pipeline, centrally, by staff at any of its offices and to accurately forecast and plan future sales.

## The Solution: Sugar Professional

TIM Group's IT managers looked at several CRM solutions including Salesforce. It chose Sugar as a cost-effective solution that could be easily customised. Also, the fact that Sugar could be hosted on-site was a major selling point, since the company manages highly sensitive financial information for clients. TIM Group began implementation and testing of its Sugar solution in January 2009. The system was fully adopted by late February—a total of six weeks for full implementation.

As Jen Miller, global client services manager for TIM Group, recalls: "In addition to having an on-site solution, price was a big factor for us. As a small but growing organisation, we hadn't yet developed the budget for major account management systems. Due to the sensitive nature of the material we handle for clients, hosting it elsewhere would have exposed us to demanding compliance criteria."

TIM Group has made many small customisations to its Sugar solution. Miller adds, "It's very easy to customise Sugar and it can be done by anyone, whether they have technical expertise or not. When we've had any questions, Sugar has been quick to respond with an excellent level of support."

“ We’ve grown so much in the last few years, and we simply couldn’t do what we’re doing now without Sugar. ”

Jen Miller  
Global Client Services Manager  
TIM Group

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## Business Benefits

Today, TIM Group's Sugar solution is a knowledge-base resource that makes client information available to all approved personnel from wherever they are. As a result, its sales pipeline and customer data are fully transparent across the company. This has helped TIM Group manage growth and keep control of its rapidly expanding and highly demanding client base. In addition, with a clear view of sales patterns and client activity, TIM Group can now forecast accurately and plan customer interaction accordingly.

"Initially we needed a contact database, increased sales pipeline transparency, and the ability to forecast accurately," concludes Miller. "We have accomplished all of this with Sugar and also found that the knowledge base allows us to share information about and with our clients. Considering how far we've come in the last few years, I don't know how we could have managed without Sugar."

## About TIM Group

TIM Group's technology platforms provide analysis, evaluation and communication tools that enable their clients to identify market-beating opportunities. Clients include investment banks, research houses and asset managers, as well as hedge and mutual fund administrators. The company has enjoyed rapid growth in recent years, and featured in the Sunday Times Tech Track 100 in both 2011 and 2012. With 100 employees spread over three continents at offices in London, New York, Boston and Hong Kong, it handles around 4,500 clients worldwide.



## Company Profile

**Headquarters:**  
London, England

**Founded:** 2002

**Company Description:**  
TIM Group's online platforms analyse and evaluate client data to help it identify, communicate and track opportunities that will outperform the market.

**Website:**  
[www.timgroup.com](http://www.timgroup.com)

**Solution:**  
Sugar Professional

## 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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