



Company Profile

Headquarters

Richardson, Texas

Founded

1999

Company Description

HRsmart's Unified Talent Management solution enables companies to recruit, appraise, train, develop top talent, and report on every category of talent management with one, feature-rich cloud solution.

Website

www.hrsmart.com

Solution

Sugar Professional™ On-Demand

For HRsmart, No Lead Goes Unmanaged

Sugar® Keeps Company's Sales Process Visible And On Track in the Cloud

HRsmart, a rapidly growing global human resources technology company, optimized internal IT resources with a hosted Sugar solution. Sugar has increased efficiency in the areas of lead management, sales process tracking, and project management. As a result, HRsmart now has a comprehensive and accurate view of its sales pipeline, effective forecasting, and can generate comprehensive reports in less than five minutes.

Business Challenges

When HRsmart global marketing manager and SugarCRM administrator Jad Chahine arrived at the company in 2008, HRsmart was a growing company with an on-site deployment of Sugar. Evaluating the company's use of Sugar and the various needs of HRsmart's global offices was one of Chahine's top priorities. "We needed to get everyone on one system," explains Chahine. "And the system needed to be optimized to track our pipeline globally, accommodate different currencies, and effectively manage notifications to multiple sales teams."

The Solution: Sugar Professional On-Demand

HRsmart inventoried its processes against Sugar's capabilities. For optimal efficiency, HRsmart moved from Sugar's on-site solution to its SaaS offering. "We were not set up for hosting and moving to a hosted solution would allow us to maximize our resources and our use of Sugar," continues Chahine. "Since we moved to a hosted version, we get all Sugar's benefits without the need to increase spending on internal resources. We can optimize our current processes and enhance them with new features as they're made available."

Today, Sugar is configured to display information by HRsmart's regional sales teams in the USA and around the world. Team members do not have to sift through irrelevant information when they log in. They see only what's relevant to them. After HRsmart welcomes a new client, the implementation and project management team take over. Since all the client information is already in Sugar, the project management team can pick up where the sales team left off, which ensures a smooth transition between HRsmart's pre- and post-sales support.

HRsmart also uses Sugar to log demos, calls, and emails associated with each opportunity. "We can see the account from a macro level view," says Chahine. "Or we can drill down and see the lead and contact information. It's as granular as you want it to be." And when necessary, the company can create new modules to add functionality. "I created a module to track RFPs by myself," comments Chahine. "With Sugar's ease of use, we can configure Sugar to meet whatever needs we have."

"There's no point in having information if you can't get it out. With Sugar, I can create any report I want in less than five minutes. It's so easy anyone can do it."

Jad Chahine, Global Marketing Manager and SugarCRM Administrator, HRsmart



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Business Benefits

HRsmart's use of Sugar has brought the entire company into the same sales process and increased efficiency in the areas of lead management, sales process tracking, project management, and reporting.

As a result, it has a comprehensive and accurate view of its sales pipeline and has improved forecasting. When employees log into Sugar, they can immediately see active leads and opportunities. "Having those numbers at our finger tips is invaluable," Chahine says. "For example, we can pull reports with beautiful, interactive graphs that display how many deals are expected to close in the next 90 days or the next six months and their total contract value. Without Sugar this would be a time-consuming, manual process."

In addition, Sugar has improved HRsmart's reporting. The company runs a global and U.S. sales pipeline report often throughout the year. "There's no point in having information if you can't get it out," Chahine observes. "With Sugar, I can create a report in less than five minutes. I can pull any field I want with just a few clicks. We can pull out more than just information about prospects. We can see who the sales rep is and in which country a lead or opportunity is active. Honestly, I think a third grader could do it."

Dashboards are now configured to fit an individual's work process so nothing falls through the cracks. "When I log into Sugar, I know exactly what has to be done," says Chahine. "I don't have to go to the Outlook calendar or look through my email. I don't have to read notes that I've written at my desk. I can add a chart from a report that I created onto my dashboard. It's all right there in Sugar. There's no reason to use anything else."

Sugar also protects HRsmart from the negative impact of employee turnover. Because it has everyone working from Sugar, the sales team can just pick right up without missing a beat. All the notes, the calls, and the demos for each customer are available right away.

Companies engage HRsmart because they want a single sign-on HR system that can automate and manage the entire HR process from pre-hire and post-hire to reporting. "People want to be able to manage everything in one place," Chahine concludes. "And that's what we get from Sugar. Sugar is so configurable it can work for a global company like us or a small company with one office and just a few employees."

About HRsmart

HRsmart helps organizations worldwide address the complex challenges of today's human resources and compliance issues with its talent management cloud technology. Companies can manage every category of talent management, including applicant tracking, employee performance, learning management, and career development/succession planning with one cloud solution. The future of talent management is here; welcome to Unified Talent Management.