



## When It Comes To Its Customers, Koozai Leaves Nothing to Chance and Achieves a 96 Percent Client Retention Rate

### SugarCRM Ensures Leading Digital Marketing Agency Handles Every Detail with Precision

#### Company Profile

##### Headquarters

Southampton, United Kingdom

##### Founded

2006

##### Company Description

Koozai is a multi-award winning digital marketing agency that provides a range of industry leading services from organic SEO and pay per click (PPC) management to copywriting, affiliate marketing, online PR, and social media. The company is ISO accredited for its quality management processes and is one of the UK's fastest growing technology companies having been ranked 23rd in the Deloitte Technology Fast 50.

##### Website

[www.koozai.com](http://www.koozai.com)

##### Solution

Sugar Professional™ On-Demand

As Koozai experienced rapid growth—adding high-profile clients such as University of Cambridge, Mobile Phones Direct, and diversified technology company 3M—the firm had increasing difficulty tracking customer interactions across sales and marketing.

Previous deployments of Salesforce.com and Microsoft Dynamics CRM didn't provide Koozai with the flexibility it needed to meet industry-specific requirements. "We went from Salesforce to Microsoft due to escalating costs," recalls Rob Arkell, Koozai's Sales and Marketing Director. "But when we looked at Microsoft it wasn't user friendly and it wasn't very customizable. Plus, we couldn't easily extract the data we needed for reporting purposes." "A business lives and dies by the quality, relevancy, and currency of its information", Koozai Managing Director Ben Norman continues. "We needed to put in place a set of procedures and processes that would support that requirement. SugarCRM was able to provide the platform for us to make it happen."

The company understood what it required of a CRM solution: scalability, maturity, support, flexibility, and ease of use. And during Koozai's research, SugarCRM reached the top of its short list.

#### The Solution: Sugar Professional On-Demand

In 2008, Koozai began using the hosted version of Sugar Professional. Not having to worry about software updates and on-premise support was another key factor in the firm's decision to go with Sugar. "The fact that Sugar was hosted in the cloud was appealing for us because it delocalized the issues that one gets with software of this magnitude," explains Norman. "To get a fully hosted and supported platform made life a lot easier for us. Security, access, speed, and reliability were all fulfilled by Sugar Professional On-Demand."

Koozai needed Sugar to help the firm manage its accelerated growth. But, for a growing company, technology solutions also need to be accessible and simple to use for personnel with a wide range of skill sets. Koozai found that Sugar easily met that requirement. "User adoption was really important as soon as we brought the software in," Norman notes. "Sugar was going to be used by everyone in the business. New employees receive an initial two hour induction which covers the basics of using Sugar Professional. Given the intuitive nature of the product, our new employees are soon up to speed."

*"Sugar gives us immediate access to the key facts at the key times. That gives customers a lot of confidence. We can respond fast and effectively and that's what our customers are looking for in a digital agency."*

**Ben Norman, Managing Director, Koozai**



##### SugarCRM

10050 N Wolfe Rd, SW2-130

Cupertino, CA 95014

Tel: +1 408.454.6900

Fax: +1 408-873.2872

[info@sugarcrm.com](mailto:info@sugarcrm.com)

[www.sugarcrm.com](http://www.sugarcrm.com)

As a result, company-wide access to Sugar streamlined the launch of the firm's London office, located two hours from Koozai's Southampton headquarters. After spending only two weeks at headquarters acquiring the company's basic culture and operating guidelines, the London office team was ready to go. "As soon as the team was deployed in London, they had access to all the tools they needed," says Norman. "As a result, we were all singing off the same hymn sheet from day one."

Using Sugar, Koozai has vastly improved its lead management processes and now tracks the source of every lead, regardless of where it originated. That tracking continues through the opportunity stage to closing when a new account is opened. "We know right away where all our new business comes from," comments Arkell. "And we track it right back to not just the lead, but to the initial keyword that led to someone getting in touch with us. We're very accountable from that perspective." This kind of precision helps Koozai analyze lead source effectiveness and monitor return on investment. "We match the volume of leads, opportunities, and new business generated to what we spend on each channel," says Arkell. "We're very keen on that."

Sugar reporting also supports the key performance indicator (KPI) tracking that Koozai employs to maintain client communication and work quality. As Arkell explains, "Every customer gets a minimum of two phone calls a month. Within Sugar, we can make sure that's happening. And if it isn't happening, we get on top of it straight away." Company KPIs include call minimums, leads entered, and client reports sent, all of which are tracked using Sugar.

### **Business Benefits**

Since deploying Sugar Professional, Koozai has achieved full user adoption and improved its lead management for a more streamlined sales and marketing process. This has resulted in greater efficiencies in communication, and administrative resources that support ongoing business development and growth. More specifically, Sugar helps Koozai maintain its work quality, which in turn results in an impressive 96 percent client retention rate. In fact, Norman and Arkell agree that SugarCRM supports everything the company does. As an example, Norman offers the following observation.

"We are a very professional and successful business, and like any business, we occasionally have our challenges. In a situation where you need a lot of factual data to support, say a previous event, Sugar has been able to provide that information quickly, thereby eliminating any potential for escalation."

"Sugar gives us immediate access to the key facts at the key times," concludes Norman. "If you're a customer on the phone and you're talking with a sales executive who has every conversation and every fact that was discussed at their fingertips, that comes across as very professional and it fills our customers with confidence. Thanks to Sugar, we can respond fast and effectively and that's what our customers need."

### **About Koozai**

Founded in 2006 by Managing Director Ben Norman, Koozai is a multi-award winning digital marketing agency. We help businesses connect with their customers online—providing a range of industry leading services from organic search engine optimisation (SEO) and pay per click (PPC) management to link building and social media. We thrive on building long lasting client relationships and delivering true value for money. We're very passionate about what we do—and that shows in our work. No lengthy contracts, just world class digital marketing. Koozai will help you build your brand online and achieve ROI that can be clearly measured against your bottom line.

*"Sugar's fully hosted and supported platform made life a lot easier for us. Security, access, speed, and reliability were all fulfilled by Sugar on-demand."*

**Ben Norman, Managing Director, Koozai**