



RealConnections thrives with integrated CRM and Social Business solution

SugarCRM with IBM SmartCloud Engage helps find and engage customers

Overview

The need

RealConnections wanted to get closer to customers via a CRM solution with integrated cloud tools for external collaboration that also offered mobile capabilities and had better pricing.

The solution

They moved from a prior CRM solution to SugarCRM and IBM SmartCloud™ Engage services to optimize customer relationships at every phase, from prospecting to validating a satisfied customer

The benefit

New solution provides excellent visibility into customer interactions and control over sales and service processes, optimizes the company's campaign marketing, saves money and saves time.

RealConnections is a cloud services aggregator and IT consulting company serving small and medium-sized businesses (SMBs) in the Netherlands. It helps SMBs use cloud-based services for collaboration, internet telephony (VoIP), and enterprise applications such as customer relationship management (CRM) to boost business performance, enable a mobile workforce, and reduce infrastructure costs. Although RealConnections has a location used for staff meetings and customer visits, it primarily operates online.

Because it is an SMB itself, RealConnections relies on the same technology it recommends to its SMB customers. It uses a suite of best-in-class integrated cloud offerings every day as it acquires and engages customers.

Seeking a better CRM solution

Until June, 2011, RealConnections used a CRM solution from Salesforce.com. But, says RealConnections founder and co-owner Erik Vos, "We needed a solution that was easier to integrate with various cloud tools, offered mobile capabilities, and had better pricing."

There were other needs as well. As Vos explains, "Salesforce.com is good at tracking opportunities, what you're doing today, contacts information and similar detail. They also have a product that offers a little social business functionality—for internal use. But we wanted to do social business externally."



“We use IBM social business tools and that gives us what we’re looking for, because what we want is to bring in and keep the customer close to us.”

—Erik Vos, founder, RealConnections

“For example, if you speak to a customer about an opportunity, you do that by phone or email. If you want to share a proposal with him, you need to get it to him and get back his comments. You may wish to show a presentation to explain something or persuade. I want to be very sure we keep track of all this, including the customer’s comments on the proposal and whether or not he shared that document with someone else.”

“Bottom line, we wanted to be more interactive with customers at every stage of the relationship. The reason we have the name RealConnections is that we want real connections with them. For that we needed more flexible tools than just email for communicating. The goal was being able to do social business with them online, with phone calls and web meetings and proposals or any other interactions tightly integrated with our CRM process so everything could be tracked.”

The choice is SugarCRM with IBM SmartCloud Engage services

RealConnections evaluated several CRM options, including Microsoft Dynamics CRM, which it rejected because the product lacked mobile integration. When IBM announced it was going to combine its social business capabilities with SugarCRM, Inc. services, RealConnections did a two week trial and analysis of the SugarCRM solution, finding “everything in it” to be very good, especially its accessibility from the iPhone and iPad.

Another great advantage was that the SugarCRM solution is offered as a service (SaaS). As Vos notes, “This was one of our biggest priorities. We never want to have a server installed somewhere, and we want to get new versions of the software as they come out.” This solution also enables a firm to integrate with multiple cloud-based applications, while eliminating the cost of infrastructure upgrades and maintenance.

Solution components

Cloud services

- IBM SmartCloud Engage
 - SugarCRM
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“Our cost is about a third of what we spent on Salesforce, our data is better, and we have more CRM functionality. Plus, with SugarCRM and IBM, migration is a smooth process. Don’t be afraid to migrate.”

—Erik Vos, founder: RealConnections

RealConnections chose Sugar Corporate On-Demand with Sugar Mobile Plus to support its field sales staff, and integrated this with IBM SmartCloud Engage. Sugar Mobile Plus enables access to SugarCRM from a smart phone or tablet and securely stores a copy of the data on the mobile device. IBM SmartCloud Engage with its social networking and collaboration tools helps optimize the effectiveness of sales and customer service staff, as well as providing flexible online tools like email, instant messaging, file sharing, and web meetings for communicating and collaborating with customers and colleagues.

Social Selling and CRM support and track the customer relationship

Conducting meetings, sharing documents, showing presentations—all these interactions are tracked in SugarCRM. “When we share documents like proposals and presentations, what we shared and who shared it becomes part of the customer opportunity in SugarCRM,” Vos says. “For the customer, the meeting is simply an open discussion, but on our end we know exactly who was involved, what was shared, and at what stage in the sales cycle.”

Use of social media helps find and engage customers

“SugarCRM manages all the company’s customer contacts and opportunities, and facilitates further insights about customers and prospects through its integration with social media. Vos explains how this works. “Once we have a lead on a target customer, we put them in our system. SugarCRM has very good integration with LinkedIn and Twitter, so before we call on someone we look at their LinkedIn and Twitter feeds to see if we already have a connection with them. We might know someone at their company or someone who knows them. And we can learn more about their background and current responsibilities.”

With Twitter we can follow people's interest in specific subjects. For instance, we sell VoIP, so we can watch Twitter feeds to spot people talking about that. If someone posts something about VoIP and is looking into it, you have a trigger. You look up his Twitter stream before you call or send an email, and when you follow up you have a real, active opportunity. If he's already thinking about VoIP and we know it, we can relate to him so much better from the first encounter. And if we call the next morning after his post, we can be the first among competitors to engage him, a big advantage.

"We are very active in the discussions on the social media—not telling about things we are good at, but answering questions in these areas. Initially it's a lot of investment. You have to be open and tell everything, giving it away for free and not knowing if you will get anything back. But we get new customers who bond with us after we've helped them through these channels. We have customers we only engage through social media, whom we hadn't known of before but just followed there, saw their discussion and saw we could help.

"Using the social media strategically helps you know customers better than the competition. They tell the world what they think, and you have the advantage of that. You know what their problems are and you can act on them. Customers benefit because we don't do cold calls on them. I know their problem if they are asking the world for help, and I can respond to that. If they don't have problems, they don't need us so we don't have to be there. That saves time."

Realizing other benefits

The Integration of IBM SmartCloud Engage and SugarCRM with their strong mobile features gives RealConnections excellent visibility into customer interactions as well as control over sales and service processes.

It also enables the company to initiate web meetings with customers directly from the application interface with just a few clicks, and to show presentations right from there.

The solution has optimized the company's campaign marketing. When RealConnections sponsors an event to attract prospects, it creates a campaign to promote the event and monitor responses. Now they can easily track the ROI from a campaign and see every related action taken. "This really makes the campaign an integrated part of the total sales approach," says Vos.

Further, the SugarCRM mobile capabilities are a real time saver. "During the day, I don't use my laptop; I use my iPhone. The creation of an opportunity is just click, click and it's in the system, which is valuable for all of us."

Finally, "With SugarCRM, our cost is about one third of what we spent on salesforce.com," concludes Vos. "Our data is better and we use more CRM functionality for significantly less money. Plus, migration is a smooth process. Don't be afraid to migrate."

For more information

To learn more about IBM Social Business in the Cloud, please contact your IBM marketing representative or IBM Business Partner, or visit: ibm.com/cloud-computing/social



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Software Group
Route 100
Somers, NY 10589

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