

---

# **CHOOSING AND IMPLEMENTING CRM SYSTEM FOR A SERVICE COMPANY**

Nordmaja OÜ



Bachelor's thesis

Degree Programme in Industrial Management

BEIMNU11A7/Spring 2015

Kukoyi-Ajayi Omowunmi



Valkeakoski  
Degree Programme in Industrial Management

---

<b>Author</b>	Kukoyi-Ajayi Omowunmi <b>Year</b> 2015
<b>Subject of Bachelor's thesis</b>	Choosing and Implementing CRM System

---

ABSTRACT

The present economic situation has necessitated the acquisition of competent tools and technologies such as CRM by organizations to enable them to monitor and optimize each customer interaction in order to maximize return on investment, to improve customer retention and to gain customer loyalty. The commissioner of this thesis, Nordmaja OÜ is an HVAC services company, registered in Estonia with operations around the world. It is an SME that is growing and has plans for future expansion.

The thesis project aimed at solving some challenges experienced by the commissioning company such as: How to measure customer efficiency/performance, how to assess the closest competitors, customer satisfaction, and how to create the right tools and methods for achieving these goals.

The practical implementation of the project was approached using the Agile Project management technique for software development projects. This project approach involved several iterative tasks which are conceived and executed to conclusion as the situation demands in a very adaptive way. This approach was very convenient to be employed here as the thesis commissioner was actively involved in the project from start to finish and this approach also allowed for frequent testing of the project. The theoretical aspect of the project involved the use of the internet and literature in the field. Brain-storming sessions were conducted through: Skype, emails, face-to-face, Google docs, Google spreadsheet, and Gantt for web-based project scheduling.

**Keywords** Customer Relationship Management, Open Source CRM, HVAC services and Automation.

**Pages** 33 p. + appendices 6 p.

---

## CONTENTS

LIST OF ABBREVIATIONS .....	3
1 INTRODUCTION .....	1
1.1 Background information .....	1
1.2 Commissioning company .....	1
1.3 Research questions .....	2
1.4 Research methodology .....	2
1.5 Structure of thesis.....	3
2 CUSTOMER RELATIONSHIP MANAGEMENT .....	3
2.1 Definition of CRM .....	3
2.2 Classification of CRM.....	5
2.2.1 Strategic CRM .....	5
2.2.2 Operational CRM .....	6
2.2.3 Analytical CRM.....	7
2.2.4 Collaborative CRM .....	7
2.3 The concept and relevance of CRM.....	7
2.4 CRM in a global perspective.....	8
2.5 Best practice in CRM implementation .....	9
2.6 Basic features of CRM applications.....	10
2.6.1 Sales analysis features .....	11
2.6.2 Sales channels management features.....	11
2.6.3 Customer service features.....	11
3 CRM PLATFORMS.....	11
3.1 Open source CRM.....	11
3.1.1 Sugar CRM.....	12
3.1.2 Vtiger.....	14
3.2 Vtiger comparison chart as shown in Figure 10.....	19
3.3 Cloud CRM .....	20
3.4 Social CRM.....	21
3.5 SME CRM.....	23
3.6 Evolution of CRM.....	24
4 CASE STUDY-NORDMAJA .....	26
4.1 Objectives of the project .....	26
4.2 Project approach.....	26
4.3 Stages involved .....	27
4.4 Results .....	28
5 CONCLUSION .....	29
SOURCES .....	31
APPENDIX 1 VTIGER CRM CASE STUDIES	
APPENDIX 1 SUGAR CRM CASE STUDIES	

---

## LIST OF ABBREVIATIONS

CRM- Customer Relationship Management

HVAC--Heating Ventilation Air Conditioning

ROI--Return on Investment

SME--Small and Medium Enterprises

SMB--Small to Mid-sized Business

SCRM--Social CRM

SAAS--Software as a service

SFA--Sales Force Automation

TCO--Total Cost of Ownership

ECM--Enterprise Content Management

CEO--Chief Executive Officer

CIS--Customer Information System

ERP--Enterprise Resource Management Programme

---

# 1 INTRODUCTION

## 1.1 Background information

In the present economic situation, organizations cannot rely on instinct or physical prowess to optimize the value of their customer relationships. Rather, they require competent tools and technologies such as CRM which enables organizations monitor and optimize each customer interaction in order to maximize their revenue and to improve customer loyalty.

Organizations are not just interested in tracking customer interactions, but to optimize their business operations by automating routine tasks and standardizing best practices. CRM enables all these features and thereby enables organizations to better acquire, manage, serve and extract value from their customer-base while improving their operational efficiency which is very critical in today's economy.

Successful CRM implementations enable organizations to improve their business processes, efficiency, productivity, profitability and ultimately their return on investment.

## 1.2 Commissioning company

The Commissioning Company, Nordmaja OÜ is a SME registered in Estonia with operations all around the world. Nordmaja offers HVAC and Automation Diagnostics and Repair Services all around on a world. The company has also a joint-partnership with AB Polar OÜ in Estonia and it is responsible for all AB Polar OÜ product installations in Finland, incl. Åland. (Salin, 2014)

Service offerings:

Heating, Ventilation, Air-Conditioning, Automation

Heating: Refers to heating sub-stations such as heat exchangers, pumps, valves and sensors.

Ventilation: Refers to the physical ventilation system inclusive of belts, filters, and supply air fan, cooling coil, ducts and thermostats.

Air-Conditioning: responsible for cooling machines, pipes and valves inclusive of ventilation machine.

Automation: Includes whole system such as sensors and field actuators.

Figure 1 shows an example of HVAC design for a private residence.



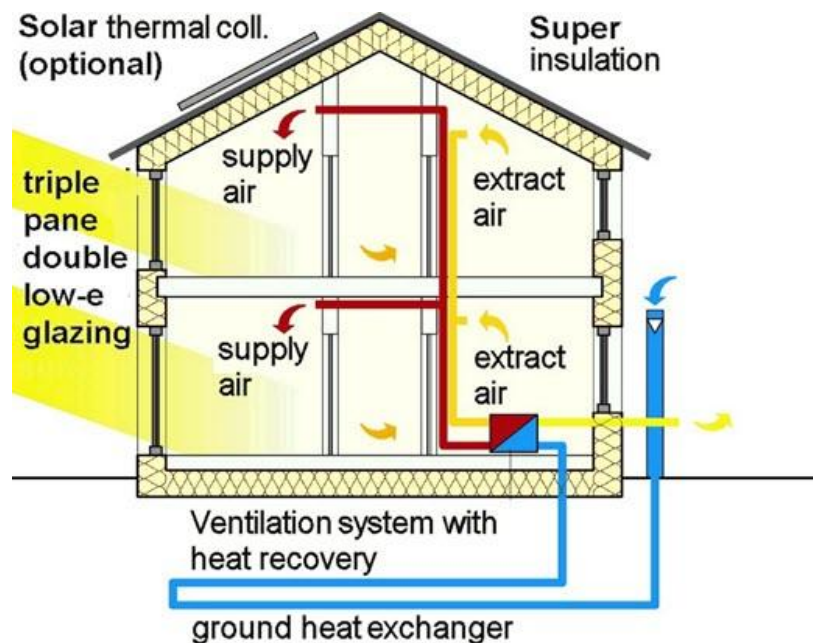


Figure 1 HVAC design for a private residence (Green programs, passive house).

The company services maintenance companies, property managers, maintenance managers, property owners and private individuals (Salin 2014.)

### 1.3 Research questions

The author received an email message from the CEO of the commissioning company on 29<sup>th</sup> May 2014, in which the following problem statements surfaced:

- How to measure company efficiency and/or performance?
- How to create the right kind of tools and methods for that?
- How to monitor the company's closest competitors?
- What the present customers are thinking of the company's services?
- Should the company develop these issues, if so, in which way?

### 1.4 Research methodology

There were a couple of issues that needed to be cleared before the project initiation. Firstly, there was need to understand the business strategies, operations, geographical coverage, what needed to be improved and what strategies to be adopted.

This led to more critical questions such as: what business applications were employed in the day-to-day running of the business, considerations for change and readiness for acquiring new applications to improve business performance.

There were lots of brainstorming sessions and a gap analysis of the as-is against to-be was conducted which finally led to the software recommen-

---

dation, evaluation and consequently the final selection and eventual implementation of the CRM system discussed in this thesis.

The project was conducted through face-to-face meetings and by employing virtual means such as Skype, Outlook e-mail, Google docs, Google spreadsheet and Ganttter for web-based projects.

## 1.5 Structure of thesis

Chapter one contains background information to this thesis, a brief introduction of the commissioning company, research questions on which the project was based and the research methodology.

Chapter two gives expletive definitions to the concept such as: Customer relationship, classification of CRM, relevance of CRM, global perspective of CRM, implementation of best practices, CRM evolution and the basic features of CRM applications.

Chapter three examines the different platforms on which CRM exists, the concept of open source, and examples on open source CRM systems such as Sugar and Vtiger with a comparison to open source CRM systems. This chapter also gives information about the evolution of CRM and the impact of cloud technology and social media on CRM applications.

Chapter four focuses on the CRM project as a case study for the commissioning company. It deals with the project objectives, project approach, stages involved, and the outcomes of the project.

Chapter five contains the conclusion of the thesis project and its outcomes.


Appendix 1 consists of three Vtiger CRM case studies and  
Appendix 2 consists of three Sugar CRM case studies.

## 2 CUSTOMER RELATIONSHIP MANAGEMENT

### 2.1 Definition of CRM

The modern day economic situation cannot be approached with brute strength because of technology advancement and wide adoption by the masses. Organizations are therefore required to maximize the value of their customer base by adopting enabling technologies that will streamline business processes and leverage every customer interaction in order to maximize revenue opportunities and improve customer loyalty.

CRM is not only useful in tracking customer interactions, but it enables organizations optimize business operations by automating daily routine tasks and standardizing best practices. Hence, Organizations are better



able to acquire, manage, serve and extract value from their customers as they improve their operational efficiency which is very critical in today's economic situation (Microsoft Dynamics CRM 2009.).

Basically CRM functions by collecting leads or customer data, analyzing the data to understand customer requirements and adjusting marketing campaigns based on the information gathered to increase sales revenue.

The figure below illustrates how CRM works.

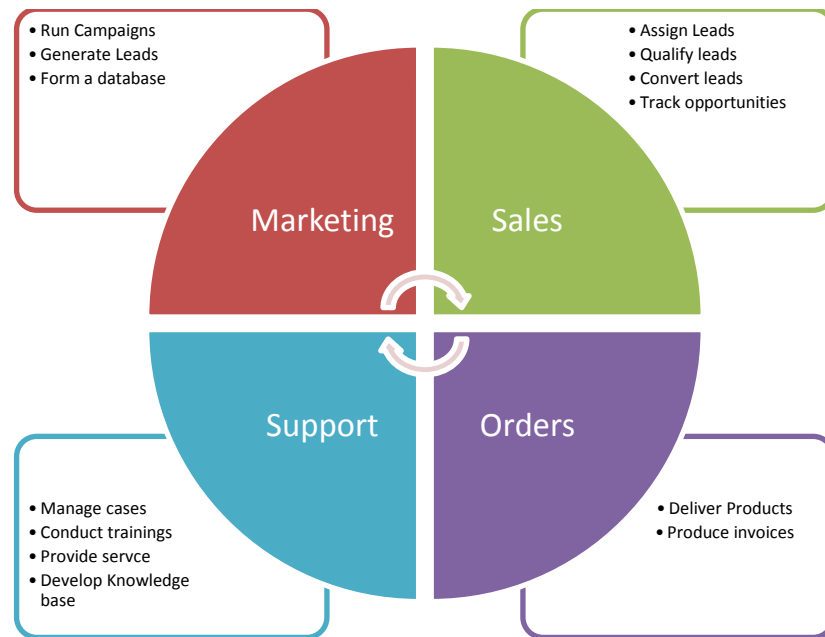


Figure 2 How CRM Works (Zoho.com)

The author gathered from several internet sources that CRM can be defined as a tool, philosophy, strategy, business solution, a technology, an approach, a methodology, which:

- Drives sales productivity and marketing effectiveness through social insights, business intelligence, and campaign management in the cloud, on-premises, or with a hybrid combination.
- Help reduce costs and increase profitability by organizing and automating business processes that nurture customer satisfaction and loyalty in the sales, marketing, and customer service fields.
- Delivers ROI through marketing automation, customer service, and sales force automation.
- Offers cutting edge technology which are important for efficient operations and it features powerful tools that help companies create competitive advantage.
- Focuses on pursuing more profitable relationships with customers and any company wishing to succeed must adopt this strategic direction.



- 
- Leverages existing infrastructure and produces lasting gains in revenue and profitability when properly implemented by boosting competitive advantage.
  - Enables enterprises manage customer relationship in an organized way. It also enables organizations manage and coordinate customer interactions across multiple channels, departments, lines of business and geographies.
  - Helps organizations maximize the value of every customer interaction and drive superior corporate performance (Microsoft Dynamics, 2009.)

## 2.2 Classification of CRM

CRM can be classified into four categories which are:

- Strategic CRM
- Operational CRM
- Analytical CRM
- Collaborative CRM

Detailed description is given below.

### 2.2.1 Strategic CRM


Strategic CRM can be described as a CRM that is focused on building a customer-centric business culture. This culture aims at winning and keeping customers by creating and delivering superior value compared to its competitors. This business culture is reflected in leadership behaviors, the design of formal systems of the company, the myths and stories that are created in the firm.

A typical Customer-centric organization should model a culture which would allow resources to be allocated where they would best enhance customer value, reward systems to promote employee behaviors that enhance customer satisfaction and retention, customer information to be collected, shared and applied across the business, heroes expected to be those employees who deliver outstanding value or service to customers.

An organization that is customer-centric puts its customers first; it collects, disseminates and uses customers and competitive information to develop better value propositions for its customers. This type of business constantly adapts to customer requirements and competitive conditions. Customer Centric culture competes with other business cultures such as:

#### **Product oriented:**

Highly innovative and entrepreneurial firms believe that customers choose products with the best quality, performance, design or features. Many new business start-ups are product oriented and in such firms it is common for the customer's voice to be missing when important marketing, selling or service decisions are made. This business culture gives little or no attention to customer research; instead the management makes assumptions about what customers want. The eventual result of this approach is that



---

products are often over specified or over engineered for the market requirements and hence too costly for many customers.

**Production-oriented:**

Production-oriented type of business shares the belief that customers prefer cheap products. Consequently these companies strive to maintain low cost operations and develop low-cost routes to market. This belief system may prove to be effective in developing economies but the majority of customers have varying requirements.

**Sales-oriented:**

Sales-oriented businesses assume that customers would be persuaded to buy if they invest more in advertising, sales, Public relations and sales promotion. It is common practice for production orientation to precede sales orientation, but the company produces low cost products and has to promote them heavily to shift inventory. (Buttle 2012, 4-6.)

### 2.2.2 Operational CRM

Operational CRM automates and improves customer-facing and customer supporting business processes. Software applications embedded in a CRM system enables the automation and integration of marketing, sales and service functions. These applications are as shown in Figure 3.

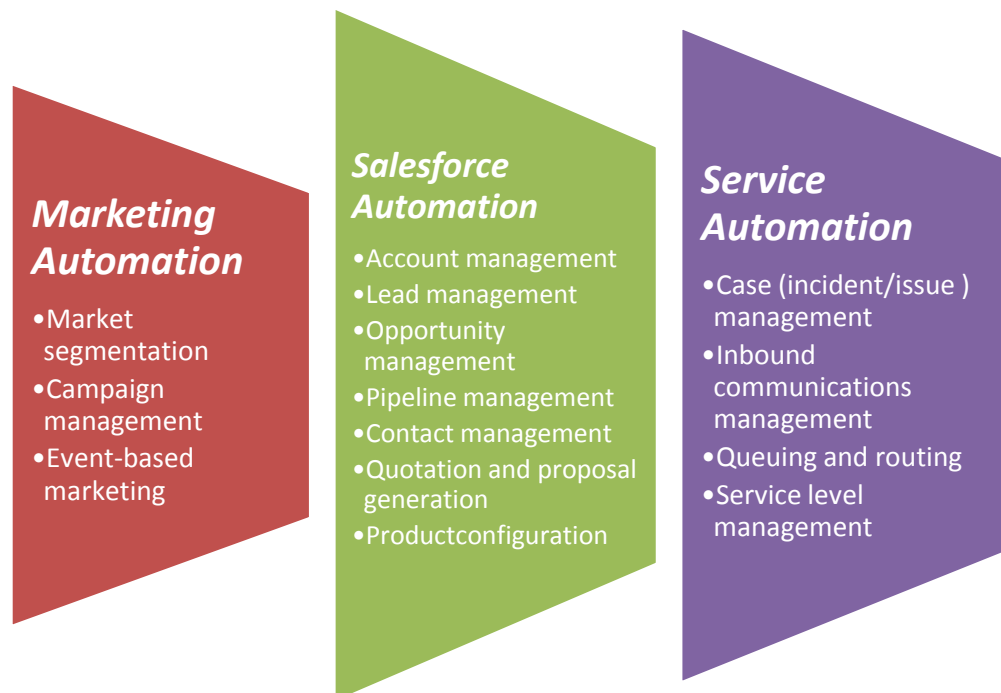


Figure 3 CRM integral functions. (Buttle 2012, 6.)

---

### 2.2.3 Analytical CRM

This CRM delivers timely, customized, solutions to problems faced by customers thereby enhancing customer satisfaction. Analytical CRM offers companies the prospect of more powerful cross-selling and up-selling programmes, and more effective customer retention and customer acquisition programmes. These prospects helps companies decide which selling approaches should be applied to differing customer groups. (Buttle 2012, 9-11.)

### 2.2.4 Collaborative CRM

Collaborative CRM is a term used to describe the strategic and tactical alignment of normally separate enterprises in the supply chain for the more profitable identification, attraction, retention and development of customers. Collaborative CRM uses CRM technologies to communicate and transact across organizational boundaries. It also enables separate organizations to align their efforts to service customers more effectively. (Buttle 2012, 11-12.)

## 2.3 The concept and relevance of CRM

The rise and appeal of CRM has come from the rise in competition which has been felt by companies in all fields and of all sizes. Added to that is an increasing sated market, replaceable products with increasingly shorter product cycles, constantly changing and ever higher customer standards and expectations regarding quality, price, reliable service as well as expectations related to market transparency via improved access to information and CRM has come to the limelight of today's successful companies.

In order to keep the lead ahead of the competition and to secure competitive advantages for the future, customer expectations are all the more getting to the center of attention in entrepreneurial activities.

The perception that having regular clientele is one of the most important factors of CRM success ruined customer relationships and had an enormous impact on CRM cost and has made it become an invaluable resource to many businesses. The importance of CRM was not recognized in past years but from an economic point of view, the consideration of CRM has now become a decisive target for board of directors.

CRM can best be described as having Knowledge of the customer, their buying patterns and preferences. It is a management philosophy with a complete orientation of the company leaning towards existing and potential customer relationships. This philosophy places the customer at the center of all company considerations with the goal of managing durable and profitable customer relationships. (Raab, Gerhard, Ajami, Riad, Gargeya & Vidyaranya 2008, 6-7)

---

**Durable** means fostering customer trust, with the goal of retaining customers and cultivating life-long relationships.

**Relationship** means getting familiar with the customer

**Profitable** refers to maximizing customer's contribution to the company's profit

**Management** describes the capacity to coordinate and further develop all interactions with current and potential customers across all organizational borders.

In this day and age, companies are required to meet the requirements of the customer with right offers at the right time; to develop a high degree of flexibility which would enable them to react to customer wishes with considerable speed, and to offer more individualistic products and services to consumers; to nurture the whole chain of events from the first contact with the customer to the establishment of the next contact.

Armed with the knowledge that a customer served today, can tomorrow become a regular, trusted customer, enables organizations reap the benefits of CRM. Hence, companies ought to understand that the supplier that wants to maintain its market position for the future should be ready to efficiently and effectively organize its current business relationships. (Raab, Gerhard, Ajami, Riad, Gargeya & Vidyaranya 2008, 6-7)

## 2.4 CRM in a global perspective

As global markets become increasingly integrated, all firms from the largest multinational to the smallest entrepreneur needs to define a market niche which will enable the firms survive in the highly competitive markets of nowadays and to flourish by identifying the best ways to meet the needs and requirement of the target customers.

A comprehensive framework for achieving excellence in today's economy is a fundamental requirement and this is where CRM fits into today's economic landscape. In order to create and sustain international competitive advantage, firms must develop strong competency in understanding which customers provide the best long-term opportunities for profitable relationships.

A successful CRM investment enables large and small organizations to achieve efficiency which is deemed impossible in an environment where there are no accurate, timely and sustained feedback mechanism that is necessary to anticipate future needs and requirements of the consumers.

Knowing one's customers and knowing what you represent as an organization are keys to the success of any modern corporation which is also a key factor for a successful CRM implementation. Global corporations have the opportunity to harness three sources of competitive advantage which can be made possible via implementation of CRM best practices. These are:

---

### **Global efficiency**

A company can lower its costs and improve its bottom line performance via location advantage when it expands internationally rather than remaining in its country of origin. CRM becomes relevant in this context as a firm is required to fully understand the customer profile that is most likely to translate into a profitable long-term relationship.

### **Multi-market flexibility**

Large multinational companies are required to respond to changes in diverse markets which are inter-related. Having a good understanding of these diverse markets worldwide will pave way for competitive advantage in the long-term. SMEs are now coming to the knowledge that failure to understand market diversification could make them vulnerable to foreign competition. CRM core requires an understanding of the customer; this strength can be utilized in achieving first-mover advantages against the competition.

### **Achieving worldwide learning**


Just as the need to understand customers in diverse markets is essential so is the need for listening to the internal customer as well. “Having a measurable goal of determining best practices in numerous operating environments is of paramount importance”. Many executives in modern day business world can attest that a company with too much centralized control quickly loses its innovative, adaptive and responsive capability to the needs of its local customers. Data collection using CRM as a tool can help companies retain customers in a profitable manner. (Raab, Gerhard, Ajami, Riad, Gargeya & Vidyaranya 2008.)

## **2.5 Best practice in CRM implementation**

The scope of a CRM project is determined by the size of the organization. An organization-wide CRM project which automates selling, marketing and service processes might involve process re-engineering, people re-skilling, and implementation of a comprehensive range of technology applications. This project can span many years and cost a fortune. The scope of the project will determine the phases, processes and tools required to ensure a successful implementation.

The key phases are outlined as follows,

#### **Develop CRM strategy:**

- Situation analysis
  - Commence CRM vision
  - Develop CRM vision
  - Set priorities
  - Establish goals and objectives
- 

- 
- Identify people, process and technology requirements
  - Develop the business case.

**Build CRM project foundation:**

- Identify stakeholders
- Establish governance structures
- Identify change management needs
- Identify project management needs
- Identify critical success factors
- Develop risk management plan.

**Specify needs and select partner:**

- Process mapping and refinement
- Data review and gap analysis
- Initial technology needs specification, and research alternative solutions
- Write request for proposal
- Call for proposals
- Revise technology needs identification
- Assessment and partner selection.

**Implement the project:**

- Refine Project Plan
- Identify technology customization needs
- Prototype design, test, modify and roll out.

**Evaluate performance:**

- Project Outcomes
- Business outcomes.

## 2.6 Basic features of CRM applications

At the most basic level, any CRM application will allow you to create a comprehensive **customer database** and update with notes, meeting schedules, documents and other pertinent information so that you can better manage your customer communication.

- A searchable customer database via categories: meaning you can tag your customers by the likelihood they will continue to use your service or product; what company they are from; prior interactions; demographics and more.
- Email marketing campaigns and social media marketing campaigns that will help you ascertain a customer's interest in your product. For example, once a client receives your promotional email, you can determine their interest by their actions:
- Did they sign up for the white paper or the free trial? Did they unsubscribe and opt out?

---

### 2.6.1 Sales analysis features

- A dashboard that offers a unique view of the data you want to analyze, in order to help you in your decision-making.
- Reporting capabilities to allow you to build analytical reports about sales and share within your organization.
- Sales forecasting tools to enable you to predict the potential outcome of any opportunity in your sales funnel.

### 2.6.2 Sales channels management features

- Channels specific forms, templates and fields: Allows you to request specific information depending on the different distribution channels you use in order to identify buying patterns and needs.
- Multi-language and multi-currency support

### 2.6.3 Customer service features


- Call center support
- Customer support issues tracking
- Social media channels support
- Integration to connect your CRM software to different platforms and applications is a critical decision making factor. As examples, check if the web-based CRM application you are considering integrates with:
- Online Accounting Software for creating quotes, invoicing, billing and keeping track of customer sales
- Email marketing software to build inbound marketing campaigns and social media platforms for outbound marketing (Christophe P, 2014.)

## 3 CRM PLATFORMS

Before choosing the CRM implemented in this project, two CRM applications were evaluated for performance and ability to meet the commissioner's set objectives. These two CRM systems exist on the Open Source platform, namely: Sugar CRM and Vtiger CRM. Hence, the reason for discussing the different platforms of CRM and these two CRM systems in particular, a comparison chart of the two systems and reasons for settling for the selected and implemented CRM system.

### 3.1 Open source CRM

The term "open source" refers to something that can be modified because its design is publicly accessible and it has its origin from the context of computer software development. Open source projects, products, or initiatives are those that embrace and celebrate open exchange, collaborative



---

participation, rapid prototyping, transparency, meritocracy, and community development. Open source software makes its source code available for modification or enhancement by anyone.

"Source code" refers to the back-end of the software that is not visible to the users. As such, it refers to the code which computer programmers can manipulate in order to alter how a piece of software, a program or application functions. Programmers who have access to a computer program's source code can manipulate that program by adding features to it or fixing parts that don't always work correctly. (Beal, n.d.)

Open source CRM gives organizations control over the CRM solution to make further modifications to meet its business objectives. It is a valuable resource for businesses of all sizes, ranging from small business to the enterprise and across all vertical markets. Open source CRM solutions available today include ZohoCRM, SugarCRM and VtigerCRM, insightlyCRM, nimbleCRM and so on.

### 3.1.1 Sugar CRM

Conventional CRM solutions have failed to deliver on the initial promise of enabling companies to drive extraordinary customer relationships for two reasons:

- Sales and support people typically don't like to use them and
- They are too expensive to put in the hands of every customer-facing employee.


The result is that companies are spending an inordinate amount of money on solutions that end up compromising their forecasts, pipelines and customer visibility. This ultimately cripples their ability to create extraordinary customer relationships.

Sugar CRM is uniquely focused on solving these critical issues by placing the individual employee at the center of its CRM solution. Sugar CRM is putting the "I" in CRM and empowering people at all levels of an organization to better understand and engage with customers over the entire customer lifecycle.

Sugar CRM offerings are as listed below:

#### **Innovation**

Sugar CRM is designed with the individual in mind, offering state of the art innovative and intuitive user experience on the market-SugarUX™. With SugarUX's modern and immersive interface, every customer-facing employee can effectively engage with customers every time thanks to a consistent Sugar experience regardless of your access point or device. Embedded collaboration tools help break down departmental silos and increase engagement and service levels. And best of all, Sugar provides contextual intelligence from internal and external data sources all within a single dashboard to drive more actionable insights for every user.





---

With Sugar, the innovative user experience is not limited to out of the box features. The power of Sugar CRM Mobile enables users to create highly intuitive, custom mobile experiences from anywhere.

### **Flexibility**

Sugar offers the broadest range of deployment options for on premise and cloud, and is the industry's most highly customizable CRM platform based on open technologies. Only Sugar gives users the level of flexibility needed to truly create differentiated, winning CRM strategies. Whether onsite, in the cloud, or On-Demand, Sugar offers the same level of functionality, customization and integration with 3rd party systems and tools. This means starting your CRM initiative knowing that Sugar scales with businesses no matter how large or customized.

### **Automation**

Sugar CRM offers powerful workflow tools which allow users to automate and optimize even the most complex business practice in order to maximize customer experience, drive productivity and reduce operating costs.

### **Customization**

A CRM system should be able to replicate business flow, not the other way around. Sugar CRM offers fast, simple customization without limits. Making the CRM is as unique as the business.

### **Extensions**

Sugar CRM offers global coverage, featuring over 26 supported languages and currencies. It also offers seamless integration with more than hundred third party applications and tools in the sugar ecosystem.

### **Customization**

Sugar CRM offers businesses the ability to deploy the CRM on their own terms, and in choice location. With Sugar CRM businesses can reap the benefits of greater control and ownership. The Sugar platform can run virtually anywhere, helping global companies comply with government and industry mandates, providing greater data privacy, and greater access and control over sensitive customer data.


### **Editions**

Sugar CRM offers three editions, namely:

- 1) Sugar Professional

Pricing: \$40/user/month, billed annually.

#### *Features:*

- Sales automation and forecasting
  - Marketing lead management
  - Support automation
  - Call center automation
  - Reporting & Dashboards
  - SugarCRM Mobile
  - Cloud or on-premise deployment
- 

- 
- 15GB storage
  - Unlimited Studio customizations
  - Unlimited online support

2) Sugar Enterprise

Pricing: \$65/user/month, billed annually.

*Features:*

- Enterprise opportunity management
- Enterprise forecasting
- Customer self-service portal
- Custom Activity Streams
- Native SQL reporting
- Phone support
- 60GB storage
- 2 sandbox instances (On-Demand).

3) Sugar Ultimate

Pricing: \$150/user/month, billed annually.

*Features:*

- 24x7 support
- Assigned Technical Account Manager
- 250GB storage
- Up to 5 sandbox instances (On-Demand).

### 3.1.2 Vtiger

Vtiger CRM is an open source CRM application which delivers everything that an enterprise rich features which are flexible, modular and easily customizable to suit the business. Vtiger CRM leverages the benefits of Open Source Software and adds more value to its users by providing advanced features such as Lead, Opportunity, Account and Contact Management, Integration with common desktop applications such as email and office productivity software and support for Quotation and Invoicing, Inventory Management, Trouble Ticketing and Customer Support activities.

Vtiger CRM also provides enterprise-grade business productivity enhancement add-ons such as a Customer Portal, Outlook plug-in for Microsoft Outlook users, office plug-in for Microsoft Word users, and Mozilla Thunderbird extension for Thunderbird email users. All these add-ons are part of the vtiger CRM Open Source project and are freely available. (libertus solutions)

## Features of Vtiger CRM

### Lead management:

- Manage leads end-to-end (from creating leads through converting them into opportunities)
- Import leads from external sources, such as enquiry emails, web forms, downloads, trade shows, seminars, and direct mail
- Change lead status as per your sales process
- Convert leads to sales opportunities, accounts, and contacts with a single click

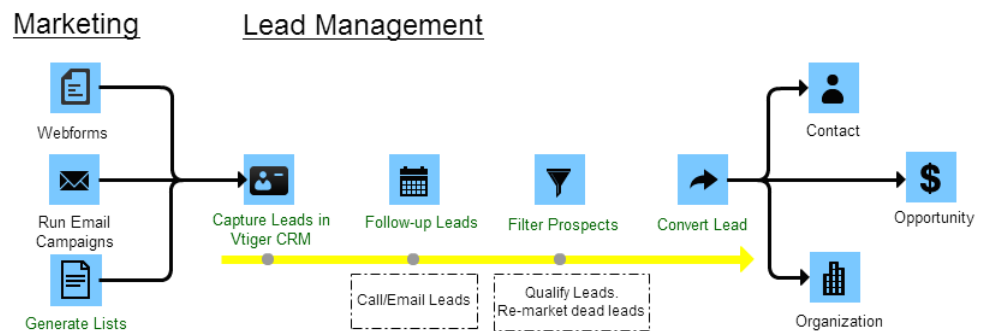


Figure 4 Vtiger Lead Management

### Opportunity management:

- Opportunity management help track all sales opportunities end-to-end in a sales cycle
- Associate opportunities with accounts, contacts, activities, and other modules to have a better visibility on the opportunities
- Export opportunities to common spreadsheet software applications, such as Libre Office, Microsoft Excel and others to analyze the sales pipeline and quickly identify the bottle-necks if any

### Opportunity Management

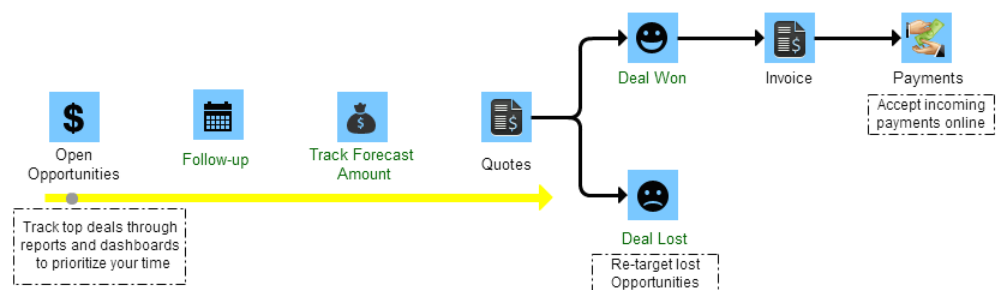


Figure 5 Vtiger-Opportunity Management

### Account management:

- Track all accounts and related contacts, opportunities, cases, and other details from a common repository
- Specify parent-child relationships between accounts and their subsidiaries or other divisions
- Import accounts from external sources, such as ACT, Goldmine, and many other applications or databases
- Export accounts to spreadsheet software to analyze the buying patterns and accordingly set up loyalty programs
- Attach customer-specific documents to accounts for a quick reference in future

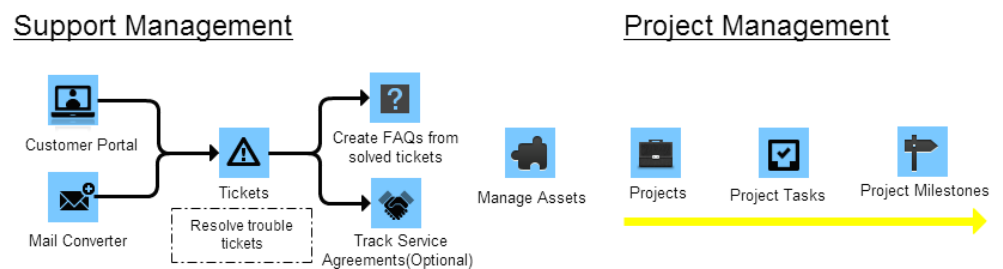


Figure 6 Vtiger-Support &Project management

### Contact management:

- Track all contacts and related opportunities, cases, activities, and other details from a common repository
- Create the hierarchy of contacts within a company to have a better co-ordination while dealing with customers
- Import contacts from external sources, such as ACT, Goldmine, and other applications
- Export contacts to spreadsheet software for further analysis
- Microsoft Outlook Plugin
- Add outbound and forward inbound desktop e-mails to vtiger CRM
- Synchronize contacts between desktop email and vtiger CRM
- Resolve conflicts while synchronizing contacts between Outlook and vtiger CRM
- Synchronize tasks and calendar between Outlook and vtiger CRM
- Filter emails in Outlook and add only necessary emails to vtiger CRM

### Inventory Management



Figure 7 Inventory management

---

### Activity management:

- Add all important customer-related emails in vtiger CRM for quick reference in future
- Store all the details of customer meetings and calls
- Manage daily tasks so vtiger CRM users have a streamlined sales process

#### Tools



Figure 8 Vtiger-Tools

### Dashboards:

- Sales pipeline analysis by stage
- Monthly sales pipeline analysis
- Sales opportunities by lead source
- Drill-down the dashboards by time and opportunity stage

#### Analytics

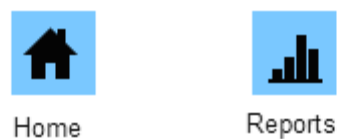


Figure 9 Vtiger-Analytics.

### Product customisation:

- Create custom fields/pick lists as per your business requirements
- Change the look and feel of the user interface
- Customize tabs using drag & drop so that modules that are not relevant to sales process can be hidden

### Security management:

- Define team roles as per your organization's structure
- Control the access to modules according to the user's role
- Archive the login history of each user for better auditing
- Record all changes made on a per-user basis (Vtiger CRM homepage)


---

## Benefits of Vtiger CRM

- It easily integrates into existing systems
- a straight process orientation
- Vtiger CRM is completely Open Source
- All Plug-ins and Add-ons are Open Source
- It is fast and easily fits in to all enterprise sizes
- It easily integrates into existing applications such as Microsoft Outlook, Microsoft Office, Mozilla Firefox/Thunderbird, via free Plug-ins and Add-ons
- It offers easy adaption of data structures
- the CRM environment can be accessed via web browser - user does not need to install any software (tested with all conventional browsers)
- It does not involve high investment costs or expensive licenses - provided under the open source VPL-license - low TCO
- It offers customer portal with trouble ticket system
- It is assured of a good future - large community of developers
- It is independent from manufacturer - source code is accessible to everyone
- It offers fast installation (installation and start up within one day)
- It is easy to use (intuitive)
- Its functionality can be customized to business requirements
- Its applications are integrated among each other, resulting in a very strong synergetic effect
- Its data from CSV-files can be imported and easily integrated into the system
- It offers a continuous development of the whole system and the existing huge community of developers guarantees quick localization and correction of errors
- Vtiger CRM was developed as open source CRM for professional solutions. Vtiger CRM is **NOT** a light version, but "enterprise ready" also for large enterprises.

## Editions

Vtiger also offers three editions, namely:

- **Sales Edition**, \$12/user/month
  - **Support Edition**, \$12/user/month
  - **Ultimate Edition**, \$29/user/month.
- 

### 3.2 Vtiger comparison chart as shown in Figure 10.

vTiger & Sugar CRM Comparison		SERVICE PUSH SUGAR CRM PREMIUM	SERVICE PUSH VTIGER CRM	ZOHO CRM	SALESFORCE.COM
<b>Hosting &amp; Licensing</b>					
List Price Per User Per Month		\$1	\$3	\$12	\$65
# of Users		5	5	5	5
Cost Per Month		\$5	\$15	\$60	\$325
Cost Per Year		\$60	\$180	\$720	\$3,900
<b>Salesforce Automation</b>					
Accounts		✓	✓	✓	✓
Activity tracking & history		✓	✓	✓	✓
Business to Business (B2B) configuration		✓	✓	✓	✓
Contacts		✓	✓	✓	✓
Contract management			✓		
Document and integrated content library		✓	✓	✓	✓
Lead capture		✓	✓	✓	✓
Opportunity tracking		✓	✓	✓	✓
Sales Quotes			✓	✓	
<b>Marketing Automation</b>					
Campaign dashboards		✓	✓	✓	✓
Campaigns		✓	✓	✓	✓
Email marketing		✓	✓	✓	✓
Marketing campaigns		✓	✓	✓	✓
Mass email		✓	✓	✓	✓
Newsletter management		✓	✓	✓	✓
SMS Marketing Campaigns			✓		✓
Web to lead capture		✓	✓	✓	✓
Mail Merge Templates			✓		✓
<b>Customer Support</b>					
Computer Telephony Integration			✓	✓	✓
Advanced case escalation and notification		✓	✓	✓	✓
Bug tracking		✓	✓	✓	✓
Call center		✓	✓	✓	✓
Case escalation and queuing			✓	✓	✓
Case management		✓	✓	✓	✓
Customer self-service portal			✓	✓	✓
Knowledge base			✓	✓	✓
SMS Messaging					✓
<b>Inventory Management</b>					
Products Catalog			✓	✓	
Price Books			✓	✓	
Vendor Management			✓	✓	
Purchase Orders			✓	✓	
Sales Orders			✓	✓	
Invoices			✓	✓	
<b>Productivity &amp; Integration</b>					
Customizable by End User		✓	✓	✓	✓
Microsoft Outlook Integration		✓	✓		
Microsoft Word Mail Merge		✓	✓		
Email integration with Yahoo, Gmail, & IMAP		✓		✓	✓
Reminders & Alerts		✓		✓	✓
Task Management		✓		✓	✓
Document Management & Collaboration		✓		✓	✓
<b>Reporting</b>					
Advance Reporting & Dashboards			✓		
Pre Built Reports		✓	✓	✓	✓
<b>Social CRM</b>					
Linkedin		✓		✓	✓
Twitter, and Facebook Integration				✓	✓
Sales Intelligence		✓		✓	✓
<b>Project Management</b>					
Create Projects		✓	✓		
Create Tasks		✓	✓		
Create Project Milestones & Deadlines			✓		
<b>Mobile CRM</b>					
		✓	✓	✓	✓

Figure 10 Vtiger comparison chart, (<http://service-push.com/sugarcrmadvtigercrm/>)

### 3.3 Cloud CRM



Figure 11 Cloud CRM features, (Webxicon.com)

”Cloud CRM” or ”CRM cloud” means any CRM technology where the software, tools and the organization's customer data resides in the cloud and is delivered to end-users via the Internet as illustrated in Figure 11.

Cloud CRM typically offers access to the application via Web-based tools or Web browser logins in which the CRM system administrator has previously defined access levels across the organization. Employees can log in to the CRM system, simultaneously, from any Internet-enabled computer or device be it office, home, hotel room, on the road, on the Smartphone, or a coffee shop. Cloud CRM often provides users with mobile apps to make it easier to use the CRM on smart phones and tablets as shown in Figure 12.

Cloud computing is often held up as a great way for businesses to save money. As companies become increasingly price conscious and space conscious, the cloud allows organizations to use only the applications and hardware capacity they need without paying for idle computing resources.



Figure 12 Cloud CRM-anywhere access (Briana Stock, 2014)



---

## Benefits of Cloud CRM

Cloud not only takes away the headaches that organizations have with regards to implementing solutions, it also helps them keep the software up to date and ensures that the organization is getting the right functionality.

One main benefit of CRM software delivered in the cloud is scalability. A cloud-based system is designed to be flexible with expanding capacity so a business can scale up or down their CRM depending on current business needs. Typically costs of the CRM, which is often based on the number of users and storage requirements also scales up and down as you requirements change.

While big budget CRM implementations may be out of reach for some, CRM on the cloud is decidedly not. In the interconnected world, engaging with customers is critical for success but can come at a high cost. Cloud computing aims to alleviate that cost and make CRM accessible for everyone.

Cloud CRM is often a good choice for small businesses that lack the in-house IT expertise to deploy, manage and upgrade an on premise CRM application. With Cloud CRM the vendor is responsible for managing the software, providing updates across the system and taking care of technical glitches, bugs and other issues as they arise.


*Other benefits of CRM in the cloud include:*

Integration with commonly used office applications and email systems, integration with social data social CRM and automatic data backups.

As businesses have increasingly recognized the immediate benefits associated with CRM on the cloud, there has been a significant uptick in companies using it. In fact, some companies are using CRM on the cloud as a fast, cost-effective first step toward an on premise CRM solution, a larger project which can take up to two years to implement while some companies can get a CRM on the cloud up and running in weeks. For many of those companies that want to dip their toe in the water and eventually implement a full CRM system, CRM on the cloud allows them to learn and gain value from the experience because the cloud offers a productive working system with little upfront cost in terms of acquiring infrastructure and skilled resources.”(Vangie B. n.d.)

### 3.4 Social CRM

Social customer relationship management (SCRM) is a phrase used to describe the addition of a social element in traditional CRM processes. Social CRM builds upon CRM by leveraging a social element that enables a business to connect customer conversations and relationships from social networking sites in to the CRM process. Social CRM may also be called CRM 2.0 or abbreviated as SCRM (social customer relationship manage-



ment). Thanks to social media, consumers now control the dialogue with companies, and CRM systems must adapt.

Whilst traditional CRM is described as a philosophy and a business strategy which is supported by a system, and a technology designed to improve human interactions in a business environment. SCRM is described as a philosophy and a business strategy, supported by a technology platform, business rules, workflow, processes and social characteristics. It is designed to engage the customer in a collaborative conversation in order to provide mutually beneficial value in a trusted and transparent business environment.

CRM is no longer referred to as a model for managing customers, but one of customer engagement. SCRM can further be described as a company's programmatic response to the customer's ownership of business conversations. Traditional CRM focuses on managing the customer; but SCRM beats traditional CRM in its ability to engage with the customer as shown in Figure 13 and 14. (Robb 2011.)

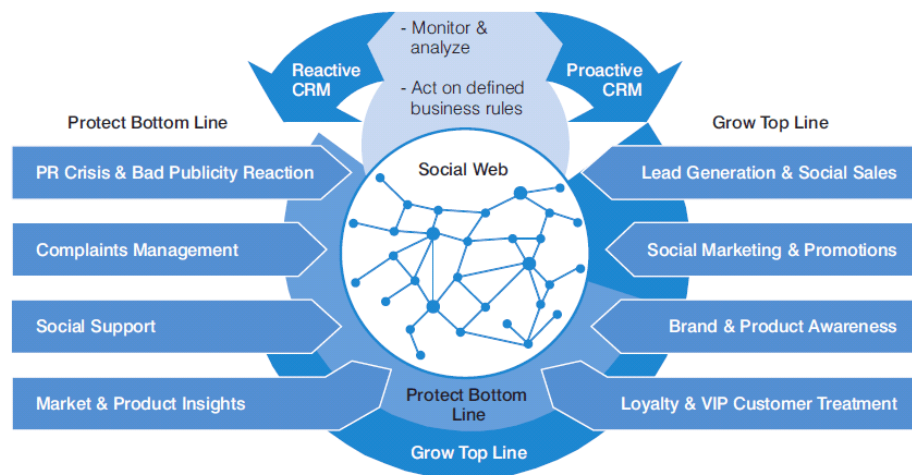


Figure 13 Social CRM features, (Tantow 2011.)

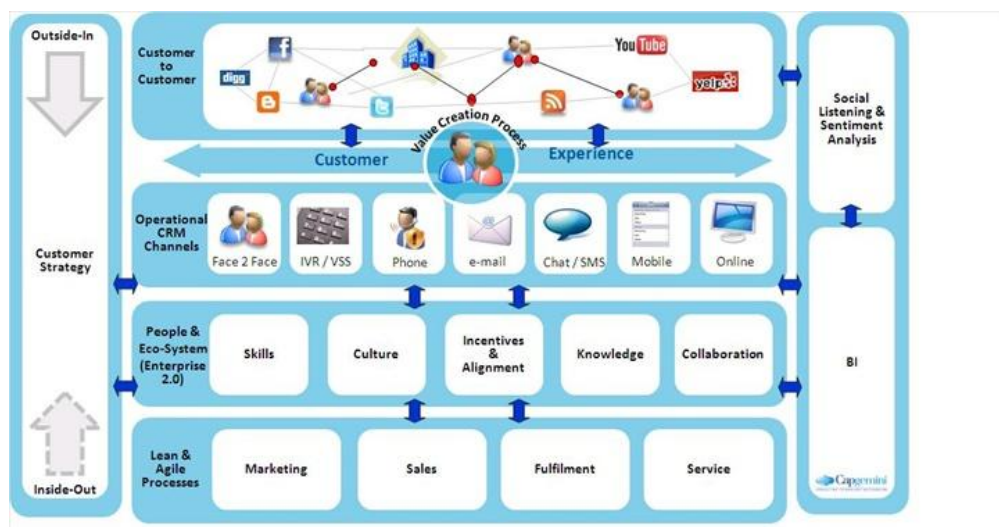


Figure 14 How Social CRM works, (Ibuchana, 2010)

---

One of the biggest challenges faced by social CRM at the moment is a lack of common understanding about what it really is. To some people, social CRM is just about relating to customers on Facebook and Twitter. While that might be a crucial part of the constituents, social CRM is much more than that.

Social networking has enabled customer collaboration which exerts pressure on businesses as it is much harder to ignore a coordinated group of customers than lots of isolated individuals. If a business refuses to provide a place for customers to exchange their views, the internet provides plenty of other sites for them to do it and often in a far less constructive manner. Businesses are therefore encouraged to be more attentive to their customers and put customer opinions into consideration when designing new products or identifying problems in their products.


CRM has traditionally been defined as a system involving people, process and technology which aims to optimize the identification, acquisition and retention of customers, the social media field has created a definite shift. The 'C' in CRM is slowly being replaced by an 'X' — meaning users are not simply seeing the platform used for customer interactions, but also for citizen interactions in e-government initiatives; criminal interaction by law enforcement and corrections facilities; candidate interactions for HR use and The best CRM tools on the market are also platforms for managing any kind of interaction.

The need for businesses, governments and other organizations to streamline operations, reduce costs and increase satisfaction among the parties they serve are therefore driving more widespread and varied use of CRM systems. In addition, the explosion of data inside (and outside) enterprises and organizations has revealed the need for better interaction management systems; ones that can append all types of additional data about customers and citizens. There is so much valuable information available that intelligent organizations are looking to use modern CRM tools to discover, track and store this data in addition to more traditional process automations. (Vangie B. n.d.)

### 3.5 SME CRM

SMEs are described as business which maintains its revenues and numbers of employees below a certain standard. The definition of SMEs vary from country to country for example; In the USA, SMEs are identified by the industries with which they compete, In Europe a Small sized enterprise is referred to as a company with fewer than 50 employees while a medium sized-enterprise is considered as one with fewer than 250 employees.

SMEs are known to invest a lot on IT infrastructures, thereby making them the strongest in innovation. “The need to attract capital in order to fund projects is a requisite for small and medium enterprises”. To stay on top of competition, SMEs require “out of the box solutions” and often-times foregoing some functionalities.



---

CRM brings to mind a misconception that the solutions are not well-suited to a small business environment, that CRM falls into the category of enterprise Applications and systems that require dedicated IT teams. Luckily, this isn't the case, as there are a number of CRM solutions designed specifically for small businesses.

Small business CRM software is typically lightweight (in the good sense), designed to meet the unique needs of a small business without being cumbersome, overwhelming or expensive to maintain. These systems will consolidate customer records and other data to give your business timely access to critical business data and actionable business insights. This means less time wasted trying to maneuver through reports and functions you really don't need.

CRM solutions provides the customer business data that is required to provide services or products that the customers want, provide better customer service, cross-sell and up sell more effectively, close deals, retain current customers and understand who the customer is, manage business contacts, clients, contract wins and sales leads.

Typically, CRM applications or software are considered enterprise applications which are designed for larger enterprises. Meaning it would require a dedicated team to develop custom CRM modules, another team to analyze the resulting data and reports, plus an IT staff to handle costly upgrades and deployment.

Small business CRM applications differ from enterprise CRM in a number of ways including the amount of data handled by the system, IT requirements, pricing, and the tools and features of the CRM application itself. (Vangie B. n.d.)

### 3.6 Evolution of CRM

As the world grows increasingly social, mobile, connected and cloud-based, so must organizations that hope to remain relevant. Some have dubbed this immersive technological era the “Internet of Things.” Others have referred to it as the “Internet of Everything.”

The bottom line is, the enterprise playing field has been transformed, and the customer now has greater input and influence on a company's decision-making processes. Customers are demanding a more personalized, interactive and engaging relationship with the companies they patronize. The market has evolved, and businesses now have entered the age of the "Internet of Customers" which is marked by increased collaboration and sharing, but it comes with the responsibility to provide service, accessibility and engagement without barriers. CRM helps ensure these objectives are accomplished and that long-term customer value is built. This is shown in Figure 15.



Figure 15 CRM Evolution (Enrique B. 2011)

The push toward mobile applications and interfaces in turn allows for a re-branding of the workplace: one with a stronger emphasis on all customers such as: developers, partners, employees, administrators or end users.

Competition is more intense than ever and Information is more easily accessible. Social media presents new challenges. Prospects and customers have higher expectations. They are setting the tone and driving the need for companies to be more responsive and operate at a higher level of intensity and efficiency.

Having a CRM strategy is critical for all companies, large and small. The definition of CRM has expanded beyond the “traditional” concepts of CRM sales and service and the 360° view of the customer. Two main areas of expansion are:

- 1) Lead Nurturing: Marketing plays a huge role in influencing a prospect/customer well before they engage in a sales process. Though marketing has always played a role in CRM, in many cases the dynamics of marketing programs have changed. Prospects want to self-educate and are often happy to participate in the nurturing process. If a marketing department is capitalizing on this and excelling at its nurturing programs, this often results in well-qualified, well-educated leads landing on their proverbial doorstep, ready to engage in the buying process.
- 2) Social Media: Customers and prospects now expect companies to demonstrate a social media presence, and to be able to effectively and quickly engage via that channel. Companies that want to meet the needs of today’s customers should include these areas in their CRM strategy. A common thread in these new areas is the compa-

---

ny's ability to immediately respond to a prospect/customer who reaches out. (Jennifer D. 2011.)

Gone are the days when CRM was hosted on-site, the advent of internet has changed the way CRM works. CRM is now cloud-based, which means that the services are hosted in the cloud and accessed via the Internet with a password – has enabled a new generation of CRM products that have been developed specifically for the needs of the small to mid-sized business market (SMB).

The latest evolution of web-based CRM applications is the Social CRM space, which helps businesses manage customer relationships via social media channels. While traditional CRM Apps target prospective leads through email or phone campaigns, Social CRM is an outbound marketing strategy where companies engage in public conversations with their customers. (Jennifer D. 2011.)

## 4 CASE STUDY-NORDMAJA

This chapter covers the practical aspects of the thesis project. It covers areas such as: the project objectives, project approach, project steps and project implementation.

### 4.1 Objectives of the project

The thesis objective was disclosed in a shared Google doc on the 18th of October 2014. The thesis commissioner stated His desire to have a holistic view of customer and customer related data in one package. He wants to reduce process time and avoid the complications of scrolling from one application to the other and from system to system.

### 4.2 Project approach

The project approach can best be described as Agile Project Management or also known as Agile Development Process which encompasses several iterative approaches based on the principles of human interaction management and founded on a process view of human collaboration. Agile-based methodologies are mostly employed in software development as well as the website, technology, creative, and marketing industries. This contrasts sharply with traditional approaches such as the waterfall method. In agile software development or flexible product development, the project is seen as a series of relatively small tasks conceived and executed to conclusion as the situation demands in an adaptive manner, rather than as a completely pre-planned process.

Benefits of this approach are as follows:



- It is the most consistent project management technique since it involves frequent testing of the project under development.
- It is the only technique in which the client is actively involved in the project development.
- The only disadvantage with this technique is that it should be used only if the client has enough time to be actively involved in the project every now and then.(Wikipedia, )

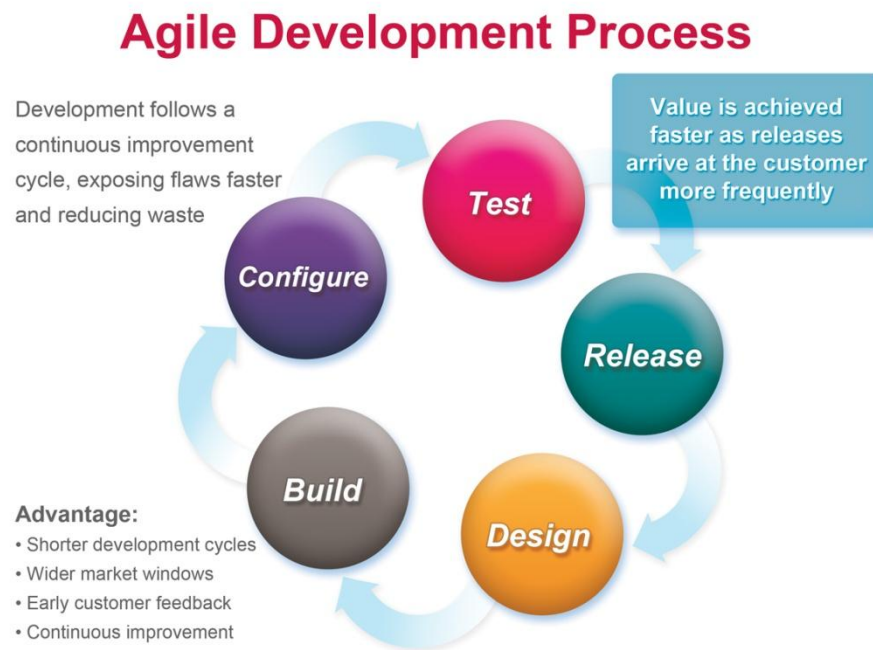


Figure 16 Agile development process (Rlungariello, 2014)

#### 4.3 Stages involved

The planning phase included an initial needs assessment, needs analysis and requirements gathering.

**Initial needs assessment:** This stage involved getting acquainted with the commissioning company, its business processes and strategies.

**Needs analysis:** This involved getting to know the business related problems, analyzing and proffering solution.

**Requirements gathering:** This involved gathering all necessary data, goals and objectives of the organization.

The pilot phase consisted of software recommendation, software evaluation, software selection, implementation plan and project charter.

**Software recommendation:** This involved recommendation of softwares that are able to meet the requirements in the above phase and searching for the right solution provider.

---

Software evaluation: This involved trying out the recommended solutions by inputting test data to know which one best suit the requirements of the commissioning company.

Software selection: This stage involved the final selection of the appropriate software and getting the buy-in of the stakeholders, in this case the Thesis commissioner and the thesis supervisor.

Implementation plan: Here, the implementation plan was made and translated into a project charter.

Project Charter: The project charter was made which contained information about the tasks, timelines and persons responsible for each tasks.

The implementation phase comprises of CRM license subscription, configuration of the CRM system, customization of the system interface and importation of business data into the system.

License Subscription: The commissioning company made the license subscription for the CRM system.

Configuration: The CRM system was configured remotely in conjunction with the thesis commissioner.

Customization: The project did not require much customization.

Data migration: All necessary data to run the system such as business contacts, opportunities, cases, invoices etc. were imported into the system.

The final phase involved the CRM system test-run, change management and plans for continuous improvement.

CRM test run: The thesis commissioner starts to test the systems functionalities to see if set objectives are met.

Change management: This involved complete transition from the old way of doing things to the new way by automating daily tasks such as assigning leads, opportunities and handling cases.

Support: This constitutes continuous improvement practices to keep the system running, constantly updated and actively supported.

#### 4.4 Results

The thesis commissioner is very pleased with the whole thesis process. Listed below are some of the outcomes of the project:

- Business process automation: The business processes of lead capture, lead qualification and contact capture will be carried out electronically, thereby eliminating manual data entry.




- 
- Increased customer response time: The integrated features of the CRM system to Google and Microsoft applications will enable easy response to customer requests.
  - A fully functional customer portal: A configured customer portal using VTiger CRM that will enable customers lodge their complains or issues.
  - A central repository for all customer data: All customer data, sales orders and invoices have been imported into the CRM system for easy access.
  - Automated business workflow: In the CRM system, the client can easily convert leads and opportunities to contacts or service accounts.
  - A 360 degree view of the organization: The CRM system enables contact synchronization, website link, email synchronization, Google applications plug-in, and mobile access.
  - Mobile access to CRM anywhere and anytime where there is internet access.
  - Hands-on administrative training and knowledge sharing between the Thesis commissioner and the Author of this work.

## 5 CONCLUSION

The project has been a worthy venture because it has helped to address the business challenges of the thesis commissioner which were a pain point and utmost on his mind.

The thesis project was very informative and practical as it involved the implementation of the Vtiger CRM system in which both thesis commissioner and author of this thesis work have exchanged professional experience and educational knowledge in order to achieve success with this thesis project.

The thesis project has helped the author to improve valuable skills which would be relevant for future work life such as:

- Organizational skills: The author has learned personal and team organizations.
  - Communication skills: The author learned to manage communications within and outside the context of the project from inception of this work to completion.
  - Inter-personal skills: The author has had to relate one-on-one with the commissioner and has leaned to co-operate and communicate effectively.
  - Project management skills: The authors project management skills were further strengthened in the course of this project.
  - Multi-cultural skills: Both Thesis commissioner and the author of this work hail from different cultures but were able to overcome the cultural differences and co-operate effectively.
- 

- 
- Business Analytics skills: The author was able to analyze the business situation of the commissioning company and made recommendations based on the facts and figures disclosed by the commissioner.

The thesis commissioner is very pleased with the thesis outcomes and is willing to co-operate more with the author of this thesis work. The thesis commissioner is equally willing to offer future projects to the author of this thesis work.

The thesis author is very optimistic and eagerly looks into the future for opportunities in CRM deployments, project management, business consulting and business analyst roles.

---

## SOURCES

Bestcrmservice 2014. How Can CRM Software Help Improve Your Business. Accessed 22 December 2014. <http://bestcrmservice.com/>

Bligh P., Turk D. 2004. CRM Unplugged: Releasing CRM's Strategic Value. USA: John Wiley & Sons. Accessed 19 December 2014.

Brianna 2014. Thriving in The Software Industry - 10 Imperative Developments In Cloud Services. Accessed 11 January 2015. <http://blog.360cloudsolutions.com/thriving-in-the-software-industry-10-imperative-developments-in-cloud-services>

Buttle, F.2012, 2nd edition. Customer Relationship Management-Concepts and Technologies. USA: Routledge Press. Accessed 29 September 2014.

Christophe P. 2014. How To Choose CRM Software-A Buyer's Guide For Small Business. Accessed 4 January 2015. <http://www.getapp.com/blog/how-to-choose-crm-software-a-buyer%C2%B4s-guide-for-small-business/>

Christopher B. 2003. "Strategic issues in customer relationship management (CRM) implementation", Business Process Management Journal, Vol. 9 Iss: 5, pp.592 – 602.

CRM Switch 2013. A Brief History of Customer Relationship Management. Accessed 4 January 2015. <http://www.crmswitch.com/crm-industry/crm-industry-history/>

Delalio J. 2014. The Internet of Customers: How to Evolve CRM Strategies with the Salesforce1 Platform. Accessed 4th January 2015. <https://www.perficient.com/Thought-Leadership/Perficient-Perspectives/2014/Salesforce1>

Enrique B. 2011. Social CRM: sCRM Evolution. Accessed 26 January 2015. <http://www.enriqueburgos.com/2011/01/social-crm-primeros-pasos/scrm-evolution/>

Fjermestad, Jerry, Romano, Nicholas 2014. Electronic Customer Relationship Management. USA: M.E. Sharpe, Inc. 2006. Accessed 19 December 2014.

Henrik V. 2008. Open Source Customer Relationship Management Solutions- Potential for an impact of open source CRM solutions on small and medium sized enterprises. Accessed 2 January 2015. [https://books.google.fi/books?id=anJuZJhtg7kC&lpg=PA17&ots=gNXnR3XS\\_y&dq=crm%20implementation%20for%20small%20and%20medium%20enterprises&pg=PA16#v=onepage&q&f=true](https://books.google.fi/books?id=anJuZJhtg7kC&lpg=PA17&ots=gNXnR3XS_y&dq=crm%20implementation%20for%20small%20and%20medium%20enterprises&pg=PA16#v=onepage&q&f=true)

IBM n.d. CRM in the Cloud: What you need to know. Accessed 7 January 2015. [http://www.ibm.com/midmarket/common/att/pdf/Feat\\_2\\_CRM\\_Cloud.pdf?ca=fv1302&me=feature2&re=usart](http://www.ibm.com/midmarket/common/att/pdf/Feat_2_CRM_Cloud.pdf?ca=fv1302&me=feature2&re=usart)

- 
- Ibuchana 2010. A business framework and operating model for CRM and Social CRM. Accessed 11 January 2015. <http://www.capgemini.com/blog/capping-it-off/2010/04/a-business-framework-and-operating-model-for-crm-social-crm>
- Investopedia n.d. Definition of Small And Midsize Enterprises – SME. Accessed 3 January 2015. <http://www.investopedia.com/terms/s/smallandmidsizeenterprises.asp>
- Magaña A. 2010. Implementing SugarCRM 5.x. Olton, Birmingham, GBR: Packt Publishing. Accessed 29 September 2014.
- Martin 2011. Social CRM – Opportunities and Challenges for Enterprises. Accessed 11 January 2015. <http://cloudtimes.org/2011/01/11/social-crm-opportunities-challenges-enterprises/>
- Microsoft Dynamics™ CRM. 2009. Customer Relationship Management: The Winning Strategy in a Challenging Economy. Accessed 14th November 2014. <http://www.microsoft.com/en-us/dynamics/crm.aspx,first>
- Nida R. 2014. Different Kinds of CRM Systems & Software Solutions. Accessed 22nd December 2014. <http://project-management.com/different-kinds-of-crm-systems-software-solutions/>
- Opensource n.d. Discover an open source world. Accessed 7 January 2015. <http://opensource.com/resources/what-open-source>,
- Patel, B.K. 2010. Fundamentals of Customer-Focused Management. Delhi, IND: Sawastik Publishers and Distributors. Accessed 6 October 2014.
- Peppers, Don, Rogers, Martha 2011. Managing Customer Relationships: A Strategic Framework (2nd Edition). USA: John Wiley & Sons. Accessed 19 December 2014.
- Raab, Gerhard, Ajami, Riad A., and Gargeya, Vidharanya B. Customer Relationship Management: A Global Perspective. Farnham, Surrey, GBR: Ashgate Publishing Ltd, 2008. Accessed 19 December 2014.
- Rlungariello 2014. Agile Project Management Meets Customer Needs. Accessed 14 January 2015. <http://computertrainingcenters.com/agile-development-meets-customer-needs/>
- Robb 2011. Social CRM Changes the Definition of Customer Relationship Management. Accessed 11 January 2015. <http://www.enterpriseappstoday.com/crm/social-crm-changes-the-definition-of-customer-relationship-management-1.html>
- Rossi, Ian D. 2011. Vtiger CRM Beginner's Guide. Birmingham: Packt Publishing, 2011. Accessed 29 September 2014.
- Salin, Sent 16.6.2014. Re: Connect-Thesis Placement. [E-mail message]. Recipient Oluwaseun Ajayi. Viewed 16.6.2014.
- 

---

Sugar CRM n.d. Product Overview, Features and Editions. Accessed 11 January 2015. <http://www.sugarcrm.com/>

Tantow 2011. Social CRM – Opportunities and Challenges for Enterprises. Accessed 11 January 2015. <http://cloudtimes.org/2011/01/11/social-crm-opportunities-challenges-enterprises/>

Vangie B. n.d. CRM Terminologies-SME CRM, Cloud CRM, Social CRM, Opensource CRM. Accessed 7 January 2015. <http://www.webopedia.com/>

Webxion n.d. Cloud CRM Service. Accessed 11 January 2015. <http://www.webxion.com/cloud-crm.php>

Whitehead, Michael. Implementing Sugar CRM. Birmingham: Packt Publishing, 2006. Accessed 19 December 2014.

Wikipedia n.d. Project management description. Accessed 26 December 2014. [http://en.wikipedia.org/wiki/Project\\_management](http://en.wikipedia.org/wiki/Project_management)

Williams, David S. Connected CRM: Implementing a Data-Driven, Customer-Centric Business Strategy. USA: John Wiley & Sons, Incorporated, 2014. Accessed 6 October 2014.

Vogt, H. 2008. Open Source Customer Relationship Management Solutions: Potential for an Impact of Open Source CRM Solutions on Small- and Medium Sized Enterprises. Hamburg: Accessed 29 September 2014.

Vtiger CRM n.d. Product Overview, Features and Editions. Accessed 11 January 2015. <https://www.vtiger.com/>

Vtiger Most powerful features and essential factors of Vtiger CRM. Accessed 10 January 2015. <http://www.vtiger.de/vtiger/why-vtiger-crm/>

Zoho n.d. How CRM Works? Accessed 22nd December 2014. <https://www.zoho.com/crm/how-crm-works.html>

## VTIGER CASE STUDIES



### Contus Increases Conversion Rates by 30 Percent with

#### Vtiger CRM.

#### Challenges

Contus, a mobility, cloud, and web Solutions Company that specializes in web app development for small to global organizations, experienced a period of sustained high growth, resulting in rapidly evolving sales and marketing processes and needs. Contus's existing CRM system wasn't capable of supporting Contus's new and frequently changing requirements, resulting in operational inefficiencies that hindered growth. As a result, Contus sought a new CRM that was capable of facilitating the company's current and future growth.

#### Requirements

- Ease of customization and field modification
- Reports compiling any in-system data
- Customer profiles, notes, and histories
- Workflows and triggered alerts

#### The Solution: Vtiger CRM on Demand

With Vtiger CRM on Demand, Contus was up and running in just a few hours. The organization's entire sales and marketing process and information is now managed with the system. Contus now uses the system to store, track, and evaluate every lead and opportunity generated by its various inbound marketing activities. Doing so enables it to focus attention on high-value deals and others requiring special attention, enabling higher win-rates. Increased data collection capabilities, and powerful alert systems and reporting tools also ensure that the organization's management is always plugged into what's happening, and is better informed in its decision making about lead nurturing and future products and services.

#### Benefits

- 30% increase in conversion rates
- \$70,000 increase in monthly revenues
- 90% increase in reporting capabilities
- Comprehensive lead profiles, notes, and engagement histories
- Greater visibility into and management of high-value deals
- Seamless transition from collection to reporting on data
- More operationally relevant workflow automation and reporting



**eLobe achieves 25% increase in marketing team productivity using Vtiger CRM On Demand**

### **Challenges**

eLobe, a new business development services company for large B2B software and services organizations in Europe and the U.S. saw a period of sustained growth, but was bottlenecked by a previous on-premise CRM solution. The CRM and on-premise infrastructure were fraught with issues that resulted in periodic lapses in access to critical sales and engagement data, affecting marketing and sales efficiency and growth. To accelerate its growth, eLobe sought a new CRM with high availability and adaptability to its marketing and sales process.

### **Requirements**

- High availability, universal accessibility
- Ease of customization and implementation
- Customizable sales and marketing workflows and processes
- Custom lead segment lists
- High level contact and deal views

### **The Solution: Vtiger CRM on Demand**

eLobe deployed Vtiger in under a week, and was able to transition from its old CRM mid-operations, with minimal interruptions by leveraging Vtiger's free customer support. Comprehensive contact views and task management features, coupled with new workflow automation capabilities and segmentation tools enable eLobe to engage with more customers and to provide a markedly improved customer experience.

### **Benefits**

- 25% increase in marketing productivity
- 100% cloud-based, paperless office
- Improved segmentation and speed of communication
- Globally accessible, high availability system
- Adaptability to complex lead nurturing process
- Comprehensive contact profiles, notes, and engagement histories
- Custom lead and contact segmentation and lists



## Customer Success Story

### Challenges

Breezway designs and manufactures louvre windows for commercial and residential buildings. Operating with a decentralized sales model, its headquarters in Brisbane Australia are far from its sales offices in Australia, Malaysia, and Hawaii. With a sales cycle maintained by salespeople in the field across various regions, and lacking centralized information systems, work was often delayed as sales teams needed to continuously reconcile each deal's progress with headquarters before beginning. This was often done manually, and resulted in information inconsistency, and an inability to rapidly create quotes and process orders.

### Requirements

- Universal access
- Ease of maintaining contacts and interactions
- Ticket management
- Sales pipeline management

### The Solution: Vtiger CRM On Demand

With Vtiger CRM On Demand, Breezway's sales team now stores and maintains all customer information and interactions in Vtiger, enabling easy access to customer-related documents like quotes and orders. Breezway also handles customer service requests through Vtiger's ticket management system, improving internal coordination and speeding up problem resolution. With Vtiger, Breezway has leaped ahead in YoY sales.

### Benefits

- 25% increase in sales productivity
- YoY sales growth
- Faster resolution of customer problems
- Consolidated and automated business processes
- Greater visibility into and management of deals and problems across the business



## SUGAR CRM CASE STUDIES



Program Productions is a highly specific and sophisticated staffing organization dedicated to helping produce live events with technical expertise and experience. The company provides crewing, labor, and data management for nationally televised sporting, concert, and corporate shows.

### Challenge

Improve workflow processes to manage staffing for more than 3,000 live events, and coordinate hiring and payments for more than 5,000 freelancers annually; increase data integrity while responding to rapid market changes; and improve internal and external information visibility.

### Solution

Sugar Professional Edition, hosted on-site; customized with ability to project staffing needs based on event types and respond to staffing and equipment variables, such as union or non-union rates and rules based on the event location.

### Results

- 50% decrease in data entry time
- 33% reduction in time to staff and manage events - recovering 6,000 staff hours per year
- Created at-a-glance listing of freelancer talent specialties to resolve on-demand hiring needs
- 100 additional staff hours saved by automated estimating and invoicing
- Increased transparency with clients



Hilco Global is a leading international financial services company that has completed billions of dollars of transactions around the world. Hilco helps companies and their professional advisors understand the value of assets and then maximize that value through asset monetization solutions, and enhance value through advisory and consulting solutions. Hilco serves retailers, wholesalers, distributors and manufacturers, directly and through their lenders, investors and advisors, which can include private equity firms, hedge funds, investment banks, law firms, turnaround professionals, accounting professionals, bankruptcy trustees and receivers.

---

#### Challenge:

Consolidate 15 databases into a “single source of truth” for customer information; decrease data entry tasks and free up employees to take on more impactful work; increase organizational transparency and efficiency; create a customer data storage and information sharing environment compatible with complex global regulatory and compliance concerns.

#### Solution:

Customized Sugar Professional implementation that automates customer life cycles from marketing to sales to account service and project completion; deployed to nearly 86% of employees in Hilco Global companies that have implemented Sugar.

#### Results:

- Single, compliance-friendly customer database accessible across the organization;
- 20% increase in sales of collateral services;
- Reduced sales cycle through targeted quote development and cross-department expertise;
- Decreased operational costs;
- Improved visibility and empowered decision making with on-demand reporting

## BancVue.


BancVue is the leader in branded, community-powered banking products that help local banks and credit unions thrive in the competitive banking industry. The company empowers clients to reclaim market share from industry giants through innovative products, world-class marketing, community engagement, and access to indispensable resources, including training, compliance, data analysis, and consulting. BancVue consistently ranks among American Banker’s FinTech 100 and, in 2011, Ernst & Young named the company’s Chairman and its CEO joint Entrepreneurs of the Year.

#### Challenge:

Provide “badass” customer service to financial institutions by combining all customer business processes into a centralized customer platform that allows BancVue to sell, service and support their customers and their customer’s customer with all of the intricacies of local markets with personalized service. Eliminate data silos; improve workflows and business processes; create actionable reports based on analytics.

#### Solution:

Sugar Professional, hosted on-site; deployed to 100% of BancVue employees in Customer Service, Finance, Legal, Marketing Operations, Sales, Technical Operations, and Training teams.



---

Results:

- BancVue has tripled in size in the seven years since it began to run its business on Sugar
- Recovered nearly 4,000 staff hours per year through automation and data consolidation
- Increased receivables by closing a three-month gap in planning and collections cycle
- Improved revenue forecasting through leads and opportunities pipeline management
- Sped assessments of clients' needs for up-sell and training opportunities via customized reporting
- Enhanced invoice accuracy