

## CUSTOMER CASE STUDY

# Western Australia Home Builder Takes to the Cloud for Sales Processes That Deliver

**JWH**GROUP PTY LTD

Home has become more important than ever in the wake of the recent pandemic. It's no longer just a living space, but a teaching, playing, and working space as well. Few would understand the importance of a well-built home like Perth-based JWH Group. As the owner of 11 household name sub-brands in Metropolitan Perth and a track record of more than 49 years of experience building houses, this third largest home builder in Western Australia has seized and opened doors for massive opportunities to build homes to suit all lifestyles and stages with its mind set on delivering high-quality customer experience.

As more new and established sectors began flourishing amidst the "new normal," the need for fast response and rich engagement with customers increased. JWH Group understood that to serve the needs of many, it must be equipped with the right tools to manage data easier and better.

### Industry ///

Construction

### Location ///

Perth, Australia

### Website ///

[www.jwhgroup.com.au](http://www.jwhgroup.com.au)

## A Better Way to Manage Enquiries and Customer Journeys

The JWH Group knew it needed a step up from spreadsheets to an easy-to-manage customer relationship management (CRM) platform when the influx of enquiries and customer feedback were starting to overwhelm its sales teams. JWH Group knew there had to be a better way to grow the business efficiently. The challenges they faced included:

- Ad-hoc and manual processes to capture and keep track of leads and customer data that can then be used by sales representatives and the marketing department. The process was convoluted, creating inefficiency when the teams were trying to increase their responsiveness to customers.
- It was a challenging task to understand what actions were taken to attend to enquiries and convert them into customers. The team was in need of a process to ensure that leads and enquiries were proactively followed up with and key escalation points were triggered when appropriate.
- Its challenges were further impounded with a manual and non-systemised approval process when designing homes for customers. It impeded the teams' ability to have all the information recorded in one single system, which could help them easily evaluate areas for improvement for customers.

The company's chief technology officer, Pep Oliveri, and team set out on a journey for a platform that could efficiently (and automatically) manage customer data while ensuring fast response times to customer enquiries and engagement.

The team selected [SugarCRM](#) for its depth of functionality that could be tailored to four of JWH Group's building brands: Residential Building WA, Oswald Homes, Plunkett Homes, and WA Country Builders. Given these four different building groups, Sugar offers each competing brand pick-and-choose functionality that helps them differentiate their offering.

"Our four main building brands are competing with each other," said Pep. "Sugar's ability to cater to our need for all data to be on one platform and still separate the four while giving our teams the same level of functionality is invaluable."

JWH Group also turned to Sugar's partner [CRM Online](#) for ongoing collaboration that would help the homebuilder get the most out of the platform. "I can't remember an instance where CRM Online didn't immediately render assistance," said Pep. "They're on top of things, and I always get the best outcome."

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Chief Technology Officer,  
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## There's No Place Like Efficiency

JWH Group now has full control of its sales machine from start to finish. The company relies on AWS-powered SugarCloud for three major objectives, including:

### 1. Lead Cultivation and Engagement

Web-to-lead capture ensures the team can act on interested prospects, while automatically segmenting based on geography and buyer profile. From there, automated lead routing and assignment ensures even distribution among sales.

### 2. Client Lifecycle Management by Workflow

The platform also tracks “time to contact” and “time to convert” across reps to monitor and continually improve on the team’s responsiveness and efficiency. This also includes escalating leads to management that are not contacted within a given timeframe to ensure accountability. As leads travel further down the pipe, automated approval processes for design and estimates are approved, systemised, and tracked with full audit history of key events.

### 3. Reporting for Management Decision-Making

Sales reps can now manage their performance in a tangible, data-driven way. Managers can keep tabs on sales rep performance and make better decisions with dashboard reporting by division.

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But functionality is only part of JWH Group’s success with the platform. Being on the cloud means smoother, more connected processes and greater reliability. It also guarantees proper backup and disaster recovery, while minimising outages. And in an era of remote work, it means team members can access the data from anywhere with the necessary credentials.

To drive adoption of the tool internally, JWH Group sought out “advocates”—employees who would use the system to its fullest extent and see the benefits of a cloud-based platform. The advocates were able to personalise their approach to highlight specific functionality like having critical customer data and history within reach.

Already, JWH Group’s back office systems are heavily integrated with Sugar. Looking to the future, Pep has a goal of expanding the company’s use of the platform with deeper functionality and add-ons that CRM Online has recommended.

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## About SugarCRM

SugarCRM helps sales teams reach their highest potential. Companies choose SugarCRM to cut through complexity, prioritize opportunities, and increase upsell using the resources they already have. SugarCRM is ideal for complex, relationship-driven industries – such as manufacturing, wholesale and distribution – looking to accelerate growth and drive smarter decision-making.

Learn more at [www.sugarcrm.com](http://www.sugarcrm.com)