

#### CUSTOMER CASE STUDY

# A Growing Moving and Storage Company Leans on Sugar to Manage Leads

Clancy Relocation & Logistics has provided commercial and residential moving and storage services since 1921. Founded in the Bronx borough of New York City, it became a founding member of United Van Lines in 1947 and, to this day, participates as one of 120 UVL stockholding agents. Clancy currently operates from five locations in New York and Connecticut.

Clancy is a growing moving and storage company, but they're not just about moving boxes. "We're about changing people's lives," says Elizabeth Domin, and Business Systems Analyst.



#### Industry ///

Relocation & Logistics

#### Location ///

Patterson, NY

#### Website ///

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



## The Story

Prior to investing in Sugar, as with many small-to-medium-sized businesses, Clancy's lead tracking was spreadsheet-based. After a while, the spreadsheets were no longer cutting it. The company's spreadsheets were static. In the case of a moving and storage company trying to create customers for life, the team wanted to have their information available when they called in. Clancy had an ERP system they used for order management, but it was not suitable for handling the lead or relationship. The Clancy team doesn't operate within one office or even in one state. Therefore, it was important that they find a hosted online staff solution. Clancy didn't want to go with in-house solutions. The company expressed its clear intention of going for a customizable out-of-the-box solution because they wanted to avoid working with developers constantly.

Clancy already had a Van Line connection. They handled some of their business through the available CRM system, which offered the company a way to track leads and opportunities on the household side. However, Clancy didn't have any system in place to handle the commercial side and needed a solution for both lead handling and opportunity management on the commercial side.

## The Results

Since the company has implemented Sugar, the team has a clear snapshot of the volume of opportunities that are making their way into the pipeline, when leads get into the next stage of the pipeline, and which lead has advanced through it. Clancy's follow-up timeframe has decreased to an hour, with a clear overview of the salesperson that followed up within a certain time frame of the receipt. For the first time, the company was equipped with the tools they needed to reach their responsiveness goals. Sugar has also enabled the Clancy team to learn from missed opportunities, thanks to the context-rich information the system offers. Today, Sugar has become the backbone of Clancy's lead management strategy. Sugar has given Clancy new insight into the quality of their leads.

**"We are looking into using it for touch point marketing and potentially lead scoring. In between receiving a lead and booking the move we're looking to do more outreach to our customers using Sugar to send them marketing emails."**

**— ELIZABETH D.**

Marketing and Business Systems  
Analyst, Clancy Relocation &  
Logistics



The system provides the company with reports and matrices that let them see where their leads are coming from geographically, allows Clancy to change their marketing strategy in real-time, and take advantage of opportunities in specific areas. In addition, the Clancy team no longer needs to manually input lead information into spreadsheets, which has led to an increase in efficiency. Having a system like Sugar in place also allows there to be more focus put on the sales team and making sure they are getting enough quality leads. But lead assignment has also become a clearer process, since implementing Sugar.

Internally, there's been an increase in management satisfaction since implementing Sugar. Managers of other departments and divisions and even the owner of the company is happy to know that they've got a handle on this, knowing exactly how many new leads the company has. Additionally, Sugar has made it possible for the team to pinpoint the source of each lead, making it easier to justify and redistribute, when necessary, budget allocations.

In the future, Clancy is excited about seeing what else Sugar can do to streamline their business! Now that Clancy has a proper lead management system in place, they are looking forward to being able to make decisions about how to further streamline their sales and marketing efforts in the future. And thanks to Sugar, the future looks oh so sweet!

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## About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit [www.sugarcrm.com](http://www.sugarcrm.com) or follow [@SugarCRM](https://twitter.com/SugarCRM).