

CUSTOMER CASE STUDY

Digital Transformation Experts Break Down Silos with SugarCRM

The Delv logo, consisting of the word "DELV" in a bold, uppercase, sans-serif font, with a small triangle pointing downwards integrated into the letter "V".

Australia-based Delv team has one mission in mind: improve the employee experience by empowering them with the technology they need. It is not surprising that the Delv team knows very well the frustration that can come with not having the tools you need to do your job confidently and productively. Delv specializes in unified endpoint management, digital security, intelligent automation, app development and consultation to help businesses become more securely connected to the people, environments, and information that's important.

As the business environment evolves, the need for secure and intelligent solutions increases. The Delv team understands that to serve the increasingly diverse needs and demands of their customers, they too must pivot by eliminating any roadblocks that could potentially prohibit them from putting their collective best foot forward.

Industry ///

Technology

Location ///

Australia

Website ///

www.delv.com

Stumbling Blocks Prevent Progress

As a customer-first organization, Delv's sales engagement goes well beyond simply winning and closing opportunities in the customer relationship management system. Its collaborative sales model is a company-wide affair, involving key stakeholders at various points in the process, with the aim to ensure that it has a singular view of what customers need along their entire journey and be able to support them when they need.

Given the pivotal role technology plays in the day-to-day operations, Delv began their search for a platform that would empower their teams to communicate and collaborate like never before.

The Delv team was feeling the burn in many areas. Heavy reliance on email communications created scenarios where items requiring action would be lost in the day-in, day-out sea of communication. Workflows to notify key stakeholders at specific stages within the sales process and one centralized platform to view everything was sorely needed to provide collaboration, efficiency, and accountability.

With a consolidated view of customer activity, Delv would be able to benefit from the ability to consistently provide positive experiences, impacting customers' perception of their brand as well as employees' spirits.

In short, the Delv team was looking to empower their employees with the tools they needed to routinely provide their customers the best experiences. As a result, Delv gained the ability to anticipate its customers' needs and deliver a superior experience time and time again.

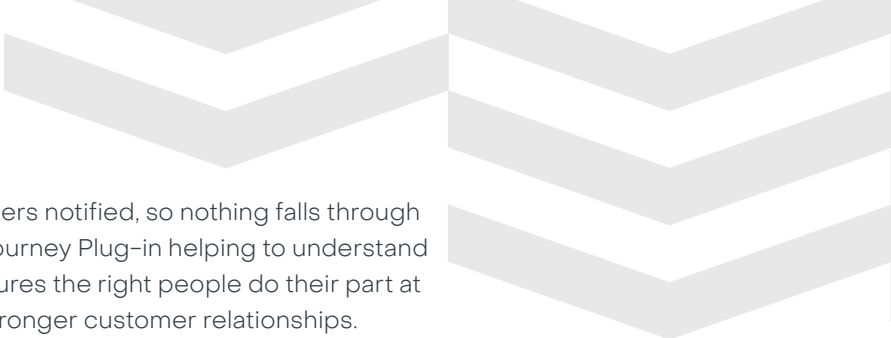
Mastering the Mission of "Customers for Life"

Delv wanted to find the right platform that could empower their sales, marketing and support teams, and after evaluating several customer relationship management solutions, felt Sugar's cloud-based platform, powered by Amazon Web Services, was the best fit to support their digital transformation. Sugar, together with partner [CRM Online](#), assisted Delv in putting the new platform in place—and that's when the hard things became easier.

According to Delv, "Sugar has become our core resource for customer information and employee experience has improved across the board. It is heavily utilized by the sales team, and with the ability to automate and allocate tasks, Sugar has quickly become an essential tool within Delv. Driving adoption isn't a concern, as it's simply a must-have tool for all our team members."

Delv's team has been empowered by Sugar's centralized platform that boosts efficiency and accountability by tracking and validating task completion, allowing the team to ditch their dependence on email to manage tasks through tools such as [Sugar Connect](#). Connected workflows map to Delv's key data sources, ensuring visibility for all extended team members and the ability to collaborate and contribute their skills and expertise.

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Sales tasks, priorities and deadlines are noted, and owners notified, so nothing falls through the cracks. Together with the use of Sugar Customer Journey Plug-in helping to understand customers interactions and engagement, all of this ensures the right people do their part at the right time to win more business and forge better, stronger customer relationships.

Delv's team also is getting a leg up with Sugar Hint to eliminate data entry busywork by automatically adding data and context to ensure the sales team is always up to date on what's happening with each account.

Delv's Continuous Commitment to its Customers

"As Delv is a national organization with offices around Australia, Sugar has enabled us to work as one team, working collaboratively on one platform. Key information is easily accessible by all stakeholders to ensure the team works in unison," said the Delv team.

By letting the platform do the work, Delv can eliminate the time and effort to access information and made business decision making easy. "With advanced report building functionality at our fingertips, we now have true insight into our performance."

"Our partnership with Sugar has been excellent from day one," said Delv. "Sugar has a fantastic support team – from Sugar University, Forums and its technical support team – responses are prompt, and you can see that Sugar wants its customers to succeed and thrive."

Looking forward, Delv will be implementing [Sugar Serve](#) and has plans to add [Sugar Market](#), and other components to bring all customer touchpoints and data into one place, further equipping the Delv team to collaborate across the organization to continuously deliver on customer needs.



SUGAR PARTNER

CRM Online was started in 2006 with a vision of leveraging cloud-based CRM (customer relationship management) and associated customer engagement platforms to help our clients drive their customer experience. We do this by helping our customers map out their own customer journey and identify the key touchpoints within that journey and how they can leverage technology and processes to improve that experience.

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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