



## CUSTOMER CASE STUDY

# Hyland's Improves Business Health by Choosing SugarCRM to Improve Operations

Hyland's  
NATURALS™

## Using Customer Relationship Management to Gain Efficiency in Sales Order Processing

Hyland's, a trusted name in the field of homeopathic medicines, has been manufacturing and distributing its natural supplements to customers in the United States and Canada since 1903.

With a rich legacy of providing high quality products, Hyland's has always prioritized efficiency and customer satisfaction. To enhance its operational effectiveness and streamline its internal processes, Hyland's made a strategic decision to implement SugarCRM, a leading customer relationship management (CRM) solution.

**Industry** ///

Manufacturing

**Location** ///

Los Angeles, CA

**Website** ///

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

## Why Hyland's Chose SugarCRM as Their Customer Relations Remedy

By choosing SugarCRM, Hyland's embarked on a journey to revolutionize the way they manage their sales and customer care functions. SugarCRM provided Hyland's with a robust platform to seamlessly share, track, and manage information between their sales and customer care teams. Since the implementation of Sugar, Hyland's no longer has a need for a third-party vendor to manage the order process, which has reduced costs. This integration of data and communication channels significantly improved the efficiency of their internal operations.

Before implementing Sugar, Hyland's did not have a sophisticated CRM system, and it was difficult for the 34 Sales and Customer Care Representatives to share information and insight into customer accounts.

A common issue was a lack of transparency of activity among team members. For example, a sales representative would visit a retail customer, and shortly after the visit, a member of the customer care team might call that same customer, not knowing that a sales rep had recently met with them. It created unignorable inefficiencies due to the lack of formal processes for sharing information and the absence of a system to enter, manage, and track prospect and customer data as well as sales activities.

In addition, Hyland's had limited reporting tools for quickly identifying which products were carried in specific stores throughout North America and internationally. Hyland's needed a CRM solution to better manage internal operations and improve the customer experience.

## Exploring CRM to Improve the Health of Their Internal Operations

As Hyland's began experiencing the power of Sugar, a need was identified for customization to the Quotes module. Nancy Rosen, a special projects coordinator, led the selection process to find a SugarCRM solutions partner to develop and implement the customization they required.

With a short list of five potential partners, Rosen became increasingly discouraged as each one said the customization could not be done. "I had one last potential on my list, which was SugarCRM. We wanted this customization so badly because without it, we couldn't launch a certain feature that would, and did, make our sales representatives able to adopt it in the field. We had to have it," recalls Rosen.

After meeting with SugarCRM, Hyland's was thrilled to learn the customization they envisioned for their sales order process was possible. SugarCRM customized the Quotes module to improve the way that turnover orders were built and emailed to distributors on behalf of customers. Prior to the customization, Hyland's Sales and Customer Care Representatives had to manually select each product on the order

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Special Projects Coordinator,  
Hyland's

individually, save it, and repeat the process for every product added to the order. Because Hyland's can have a hundred products in just one Quote, the process was tedious and time-consuming for staff.

SugarCRM customized the module so representatives can now select multiple products all at once before saving. "It is a night and day difference from what we had before," said Rosen. In fact, the customization has worked so well that Hyland's has implemented the process for internal requests between Sales and Customer Care Representatives.

## Why SugarCRM Was the Natural Choice for Hyland's

### Cost-Effective

Implementing Sugar's efficient turnover order system led to significant cost savings for Hyland's. The company discontinued an annual subscription with a third-party vendor, resulting in substantial financial benefits. Processing orders directly in Sugar and consolidating information in one place streamlined operations, enhancing efficiency and accuracy. This strategic move not only saved costs but also improved overall workflow, demonstrating Hyland's commitment to optimizing its processes and resources.

### Better Communication

Sugar's seamless information sharing transformed communication for sales and customer care teams. Real-time data exchange helped to enhance efficiency, align workflows, and expedite decision-making. It also reduced the number of misunderstandings, which lead to a positive work environment, boosting morale and productivity. The centralized platform ensures accurate, reliable information, empowering confident decision-making and maximizing business success.

### Improved Workflow


One of the advantages Hyland's experienced with Sugar was the ability to create tasks related to accounts. This eliminated the need for constant back-and-forth emails between employees. Sugar was also helpful in correctly identifying and managing accounts with the same store name, reducing confusion and inconsistencies in data.

### Greater Efficiency

Uploading marketing lists to the CRM system has streamlined Hyland's customer targeting and conversion process. By organizing and managing these lists efficiently, the company has been able to track potential leads as they progress into accounts. This method ensured precision and saved time, allowing Hyland's to launch new marketing and sales strategies more effectively. This data-driven approach has significantly improved the company's ability to convert prospects into valuable customers, leading to increased efficiency and success in their initiatives.

### More Powerful Reporting Tools

Hyland's can now run reports on all the data found in Sugar. Data and information from the many reports available in the CRM system have provided Hyland's with the insight to develop and tailor business initiatives. The company has also set up Key Performance Indicator (KPI) metrics to track objectives and results for Sales and Customer Care Representatives. At a glance, managers can gauge how individuals are performing and where improvements may be needed.



**"The whole experience was very positive, and our customization is working like a charm. It is the story of the year from our point of view because it was so important to us."**

**– NANCY R.,**  
Special Projects Coordinator, Hyland's



## How Choosing the Right CRM Was Able to Secure Long-Term Business Health for Hyland's

The implementation of SugarCRM has also brought about a significant positive change in Hyland's order management process. By leveraging the functionalities offered by SugarCRM, Hyland's eliminated the need for a third-party vendor to handle their order processing. This move not only simplified their operations but also led to substantial cost savings. Hyland's no longer had to rely on external vendors, reducing their dependency and allowing them to have full control over their order management cycle.

The partnership between Hyland's and SugarCRM has empowered Hyland's with a robust, efficient, and highly customizable CRM solution. This collaboration has not only improved internal communication and data management but has also resulted in tangible financial benefits, making Hyland's operations more cost-effective. With SugarCRM, Hyland's continues to uphold its legacy of excellence, ensuring that their customers receive the highest quality products and services backed by seamless and efficient business operations.

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### About SugarCRM

SugarCRM is a CRM software that helps marketing, sales, and service teams reach peak efficiency through better automation, data, and intelligence so they can achieve a real-time, reliable view of each customer. Sugar's platform provides leading technology in the sales automation, marketing automation, and customer service fields with one goal in mind: to make the hard things easier. Thousands of companies in over 120 countries rely on Sugar by letting the platform do the work. Headquartered in the San Francisco Bay Area, Sugar is backed by Accel-KKR.

For more information about SugarCRM, visit [www.sugarcrm.com](http://www.sugarcrm.com).