

CUSTOMER CASE STUDY

How Sugar Market Boosted Collaboration of a Leading German Robo Advisors' Customer Service and Marketing Functions



Founded in Berlin in 2013, quirion is one of the first Robo Advisors in Germany. Combining digital investments and personal advice in the premium pricing model, it looks after 30,000 customers with over 700 million euros in investment.

Industry ///

Fintech

Location ///

Berlin, Germany

Website ///

www.quirion.de



Embracing the Customer Experience with Sugar Market

The goal for quirion was to automate mail campaigns and make them more efficient while increasing conversion rates for up- and cross-selling.

The company knew it needed CRM software, but also wanted to benefit from a marketing automation solution to reduce information overload for customers while sending information that was as individually relevant as possible.

To achieve this, quirion needed a solution which offered features for personalisation and segmentation, while also being able to automate activities for customer service and marketing teams. The company decided to set up a hybrid technology stack, intelligently integrating the existing data warehouse solution into the setup.

Using a Trusted Provider to Aid Procurement

When looking for a CRM solution, quirion was made aware of SugarCRM as its parent company, the private bank Quirin, had already implemented Sugar technology. While this was an advantage, the business knew that it needed more than just a CRM solution, and worked with OPEN CX, an experienced and long-standing Elite implementation partner in DACH region with whom the private bank Quirin already had already had good experience with, to plan a bespoke solution.

After discovering that Sugar also offers a module for marketing purposes, quirion chose to move forward with its CRM solution and Sugar Market, an all-you-need marketing automation. OPEN CX and Sugar worked to smoothly integrate the Sugar components with the existing quirion Data Warehouse solution, to ensure the efficient cooperation of all the components and achieve quirion's objective of automating its mail campaigns and raising its marketing return on investment.

Christin Nagel, product manager at quirion said, "OPEN CX is a trustworthy partner, especially when it comes to project management, fine conception, and the integration of applications into existing architecture, all things we knew we could benefit from when implementing Sugar Market. Through the implementation process, we found the management of the interface to Sugar useful, especially in the case of bug fixing, the customisation of the application, as well as to ensure consistency when it comes to the implementation of Sugar Market."

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—CHRISTIN N.
Product Manager, quirion



The Future with Sugar

Today, quirion uses Sugar Market as an MVP for a selected use case. For example, in the case of a defined customer event, the solution automatically starts a mail campaign which is both personalised for the customer and transparent for the marketing and customer service teams. This allows them to glean relevant insight from the campaign.

Alongside this, quirion sees huge potential in the use of SugarCRM and Sugar Market, and is looking to replace other existing technologies with Sugar, implement further use cases and integrate business intelligence insights into the solution.



SUGAR PARTNER

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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