sugarcrm

How Terradatum Transformed Its CRM Into a Customer Data Powerhouse

TERRADATUM

Are you familiar with Terradatum? The real estate industry sure is. Companies throughout the US rely heavily on the data analytics provider to get the metrics and market analysis they need to be successful. Agents use Terradatum solutions to understand what the market is doing in a specific area, and to create more impactful marketing. Brokers rely on them to improve productivity and increase profits. Associations find the information so valuable, they position it as an incentive for membership: Join our Multiple Listing Service, agents are told, and you'll get instant access to Terradatum reporting.

From national accounts to small local clients, industry professionals are able to get the exact insights they need—at any given moment, with the click of a button. So it would be natural to assume Terradatum's internal processes for analyzing customer data are equally sophisticated. But that wasn't always the case.

Industry ///

Real Estate

Location ///

Overland Park, KS

Website ///

www.terradatum.com

A Lack Of Complete, Clean Data

It all started with the company's customer experience (CX) platform, and how it was being used.

"Everyone was using SugarCRM," says Client Services Manager Brant Myers. "Just not always in the way they should." Although people were working within the system and using the data, there were no documented best practices, no clearly defined processes and some of the new data was inaccurate or incomplete.

As a result, it had become virtually impossible to generate insightful, usable reports. There was no guarantee that essential fields would be filled, and there were no efforts to backfill them.

Perhaps worst of all, there was no surefire way to prevent errant messages from going to the wrong customer at the wrong time.

In other words…

Terradatum needed clean customer data. It was time for a fresh start.

"When the data is clean, it flows to the sales department and allows marketing to move forward with confidence. Leadership has the information they need to make decisions about our business." Myers said.

So he got to work.

To say that Myers had a roadmap in mind for Terradatum's use of Sugar would be an understatement. He saw a future where Sugar would become the originating source of truth for all customer information, interactions and experiences.

That vision wasn't at all outside the realm of possibility.

"I love that Sugar is not proprietary," he explains. "It's more customizable than other leading vendors. The flexibility means you can take the platform and fit it within your own internal processes, instead of being forced to adapt those workflows based on what has to happen within the CRM environment."

Creating the Ideal Data Machine

The first step was to set objectives.

"There's a big difference between simply using Sugar and positioning the platform as the source of truth driving everything you do," Myers says. "We needed to create a bigger purpose behind it."

Once the team had a stronger sense of what purpose the platform would serve, it was time for configurations. Rather than continuing down the road of one-time requests — such as tracking a particular field "just in case" — the platform started to take the shape of a much more thoughtful and collaborative system.

"We started to ask questions like 'Why are we tracking it?' and 'What purpose does it serve?' to seek justification for each addition," says Myers, adding that this one change had a huge impact on the company's ability to lean more heavily on Sugar.

> "Everything that we do, from marketing to sales to service, is recorded in Sugar. Every call is routed and every case is created. All of that activity is recorded, and it's how we measure our performance."
>
> —**BRANT M.,** Client Services Manager, Terradatum

Meanwhile, integrations also became a high priority. From QuickBooks and Jira to hiver and G Suite to Terradatum's marketing automation platform, it became increasingly important to ensure all mission-critical tools and apps would now flow through Sugar.

Once the new setup was in place, it was time to reintroduce the Terradatum team to the "New Sugar." As leadership worked to draw people back into this updated, more impactful system for managing the customer experience, education became essential. Best practices, training materials, documentation and general discussions have all played a role.

"Providing the 'why' behind the changes has been key," explains Myers. "We want to be sure everyone understands the purpose and can help by becoming stewards of our data."

Extracting Deeper Insights For Better Customer Experiences

Now that Terradatum is working to extract usable data, it's making everyone more efficient. When someone at Terradatum pulls up a client record, that person will see the different products that customer is using and the interactions they're having. That may sound like a simple factor, but the implications are tremendous:

- When communicating with customers who opted not to make a purchase, Sales can see at a glance why the decision was made — and keep an eye out for future opportunities to upsell.
- When certain gaps in customer engagement are identified, Marketing can build a plan around reaching new prospects.
- When Customer Support creates cases, they can be shared with Product Development to jump on important enhancements and fixes.
- When Customer Service speaks directly with customers, all relevant information is right there in front of them to help guide the conversation.

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Important metrics that were missing before — such as higher call volumes that indicate the need for more support staff — allow leadership to make important decisions based on actual numbers rather than best guesses and gut instinct.

"Taking time to define desired outcomes and how they will be measured allows us to get the analytics we need to guide better business decisions," Myers says.

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Turning Insights Into Outcomes

The steady flow of information from one department to another enables teams to anticipate and fulfill customer needs—often before they even realize they have them.

Prior to Terradatum's Sugar transformation, a closed opportunity was a lost opportunity. Once a prospect decided not to make a purchase, that was the end of the relationship. Not so today. Now, the marketing and sales teams will get reminders to follow up when the time is right.

"They were interested in Terradatum solutions at one point," Myers says. "But we didn't have a plan to revisit them proactively. We trusted that our prospects would reach out to us again, which was not as likely to happen."

Today, Sugar lets sales reps know when it's time to touch base and share information on the latest product enhancements and updates. As a result, an impressive 20% of formerly "lost forever" opportunities were ultimately turned into signed agreements.

The new Sugar setup is proving to be an enormous time-saver, too. Rather than spending 30 minutes updating accounts each time a business changes its address, users can now enter the new information once and have it automatically pushed to 50, 100 or even 150 individual customer accounts within seconds. Instead of taking several months to onboard a handful of new customers, training staff can use Sugar to schedule and complete numerous sessions and get clients up and running in no time. The department is now completing 10–15 trainings in a single week—instead of the full quarter it used to take to get through the same number.

So... what's next for Terradatum?

"We're committed to positioning Sugar as the originating source of truth for all of our client data, and will continue to focus on outcomes and performance measurements in all departments. The next big step is more automation and integration of our other back-end services. If a process is repeatable, we want to automate it, and if we have client data in another system, we want to pull it into Sugar."

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