



CUSTOMER CASE STUDY

# Unite Revitalizes Company Strategy and Provides a Fresh Approach With the Help of SugarCRM

Unite 

Unite is one of Europe's leading B2B procurement marketplaces. Founded in Munich in 2000, the company has grown both in Germany and internationally, with more than 600 employees working remotely across the world.

**Industry** ///

Business services

**Location** ///

Munich, Germany

**Website** ///

[www.unite.eu/en\\_GB](http://www.unite.eu/en_GB)

## Embracing Technology to Supercharge Capabilities and Customer Connection

While growth for Unite has been exponential, the systems in place needed to catch up. Julia Weinhold, CRM Team-Lead at Unite, explained that the previous system that had been used did not have the technical capabilities and scalability the company needed to grow its business.

The goal for Unite was to ensure that the company's platform supported a great experience for their customers, enabling them to directly connect with other businesses for procurement and selling of products and services.

The challenge was in creating a systemic sales process both in house and in the field – especially for customers buying on the Unite marketplace. The company needed to ensure a more structured way of working that would solidly document the customer journey.

Unite realised that the type of system it wanted to build would have been too costly to implement using in-house resources. From there on, the company was on the hunt to find a trustworthy and experienced partner to develop the platform.

## The Procurement Process

Following a successful pitch at a trade show, the implementation was carried out by atlantis dx with whom Unite established a strong working relationship right from the start. Weinhold commends the team for always being available, transparent, and reliable. However, the overall success of the Sugar platform is down to her novel approach to boost user adoption. Weinhold hosted regular short sessions for colleagues, named "Coffee and Sugar", where she treated the attendees to home-made bakes and shared insight into the platform's functionalities. As a result, Unite has now been a SugarCRM customer for seven years with over 200 employees using the platform daily.

## Saving Time, Giving Customers Confidence and Saying Goodbye to Duplication

Over this time, Sugar has become an intrinsic part of the sales process and connection to Unite's additional internal platforms, meaning that SugarCRM is a part of every element from start to finish. As Weinhold summarises, "Everything account-centric is running on Sugar, for customers and suppliers from their very first interaction with sales all the way through to technical support – everything happens in one place."

This included introducing Sugar into more processes as they have been revised over the years. Weinhold explains, "An implementation process for one of our products is very complex because it involves both sides of our sales organisation – but it needed to be improved. We were looking for a system in our current stack, and SugarCRM

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**- JULIA W.**  
CRM Team-Lead, Unite

was chosen because it was the best fit for our needs – it empowered us by giving us the possibility to visualise and report progress with the help of the Sugar Customer Journey Plug-In.”

Having a highly customisable solution has removed the traditional roadblocks and empowered Unite by providing a platform that is built around the company’s needs and workflows. The change has been remarkable and has saved precious time for the team, allowing them to work smarter, not harder.

“Before there was a hard cut off between the sales team who were using Sugar and the technical team – this was creating double the work, duplicating tasks, leading to inconsistencies and the risk of manual errors. Now everything is in one place, giving a single source of truth about our customers and increasing automation possibilities. It helps us to ensure that data quality is consistent, reduces manual entry and decreases the risk of human errors while also serving better status updates for internal and soon to be external purposes,” says Weinhold.

## Looking to the Future

The implementation of a new platform powered by SugarCRM will continue to support the growth of Unite in the coming years.

Having a scalable CRM solution means the company can now focus on developing its new product that is going to fully digitalise the relationship between their buyers and sellers without burdening either side with having to invest in their own interfaces. An ongoing partnership and collaboration with Sugar will be essential to maintain the highest standard of customer support throughout the process.

The logo for atlantisdX, featuring the text 'atlantisdX' in a white, lowercase, sans-serif font. The 'X' is stylized with a circular graphic element consisting of three interlocking rings.

### SUGAR PARTNER

atlantis dx is a service provider that specializes in the development and implementation of digital solutions.

[www.atlantisdX.de](http://www.atlantisdX.de) // [info@atlantisdX.de](mailto:info@atlantisdX.de)

## 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).