

## CUSTOMER CASE STUDY

# Summit Homes Group Builds Award-Winning Homes — and Customer Relationships



Building your dream home is a big decision. Home buyers will typically visit a few different builders, narrowing it down to one or two before making their final decision—usually based on their experience with a sales professional.

That's why Summit Homes Group takes its customer engagement process very seriously. An award-winning home builder in Western Australia, Summit Homes Group builds, renovates, and develops homes through a versatile portfolio of building-related businesses across realty, steel production, financial services, plumbing, ceilings, and roofing.

In such a competitive business, it's critical for Summit Homes Group to make the buyer's decision making process as smooth and streamlined as possible. To do that, Fabio Fusari, IT Manager at Summit Homes Group knows sales professionals must have a unified view of the customer to deliver the very best experience at every point in the buying journey.

**Industry** ///

Construction

**Location** ///

Perth, Australia

**Website** ///

[www.summithomes.com.au](http://www.summithomes.com.au)

## Fielding Enquiries and Follow Ups with Ease

With multiple sub-brands to manage, it's important for Summit Homes Group to field new customer enquiries in an efficient way that takes the right people to the right place. Communication is key to engagement, but the company's previous use of enquiry distribution left several enquiries unanswered and others stalled.

Without an effective lead generation and follow-up process, the company had no way of knowing where prospective buyers were in their journey or what their needs were along the way. Summit Homes Group's sales professionals needed a customer relationship management (CRM) system that would make it easier to follow up, engage with clients, and aid homebuyers in their decision-making process.

The team turned to [SugarCRM](#) for a single, unified view of the customer and a way to efficiently manage their communications to deliver the very best customer experience, no matter where buyers were in the journey. Summit Homes Group chose the solution for its simplicity and intuitive design.

"There are many solutions in the market that are very convoluted," said Fabio. "That means a lot more work for the sales teams, and we're about making it easier for them, not harder."

Powered by AWS, SugarCloud allows Summit Homes Group to adopt and benefit from a "cloud-first" strategy in a number of ways:

### 1. More time for mission-critical tasks

With a lean team focused on delivering solutions and training/education to its employees, the company's IT team needs the capacity to deal with the challenges of an on-premise solution. Having its CRM hosting in SugarCloud means that the team will have more time to focus on crucial matters.

### 2. Mobility and seamless access

Having a cloud solution enables the dispersed sales teams to access customer easily, no matter where they are. It also promotes collaboration and communications as the different business units across the Home Summit Group will have secure access to the same data.

### 3. Flexibility and scalability

Working in the cloud means the company can finetune and make changes quickly in the CRM system, ensuring it adapts to fit new business requirements. Introducing new tools is also easier, which is critical as Summit Homes Group continues to grow and expand in the future.

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**- FABIO F.**

IT Manager, Summit Homes Group



## Empowering Sales for Fast Responsiveness

According to Fabio, new enquiries coming from both in-person-visits to Summit Homes Group's display homes and those that come from digital channels including its website, social media channels and advertisements via third-party sites are now attended to quickly. The workflow capability in Sugar allows the enquiries to be routed to the right person to ensure that no enquiries are left unattended, therefore effectively managing customer experience.

Giving the right tools to the sales team is, by no means, a hassle. In fact, it means that the sales team can continue client engagement without getting tied down to additional administrative work such as unnecessary data entry. Integrating its CRM with its email and calendar tools using [Sugar Connect](#) help reduce the need to copying and pasting data, increase the capability to work on leads and opportunities within the email client and also ensure that details are not left out.

## Making Inroads to Create Customer for Life

Today, Summit Homes Group [makes the most](#) of its CRM data for the most personalised customer engagement. The platform provides Summit Homes Group with flexibility and scalability in its operations, allowing the company to pursue business growth, while meeting the demand that comes with it.

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## 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](#).