sugarcrm

WFG National Title Insurance Company Migrates to the Cloud to Realize the True Value of Automated Sales and Marketing

WFG National Title Insurance Company's Founder and Executive Chairman, Patrick F. Stone, had a vision to create a better Real Estate Transaction Experience for all parties involved. He noticed that even though some luxury cars cost as much as a house, buying one only takes a matter of hours, whereas real estate transactions take weeks or months to complete. Patrick's vision was to make the experience more efficient for all parties involved by integrating the different vendor technologies, eliminating repetitive rekeying of data, and enabling sharing of data across multiple platforms.

To become a more efficient, tech-driven company, WFG needed to implement automation at every step along the customer journey, beginning with sales and marketing.

Industry ///

Real Estate / Insurance

Location ///

Portland, OR

Website ///

www.wfgtitle.com

Automation Should Be Helpful, Not a Hassle

WFG knew it needed a CRM to maintain and build relationships with current and prospective agents. This would enable the sales team and management to see the full picture, ensuring all accounts stayed top of mind for all agents, new or old, large or small.

Their first system functioned more as an address book than an automated sales platform. When it didn't meet the company's needs, WFG decided to build its own solution, which was cumbersome and didn't deliver any real value to the sales team.

"We're not in the business of designing CRM software," said John Williams, Program Manager for Agency Operations at MyHome, a Williston Financial Group Company (MyHome). "We needed to simplify the use of the CRM and produce information for our sales team rather than just requiring input from them…so after gathering actionable information from activities and other sources, it then needed to be made immediately available and easily accessible for the sales team and not a spreadsheet sitting in someone's inbox."

WFG set out for a third time in search of a CRM that could easily integrate with required systems. The company explored a well-known enterprise CRM provider but found it was costly and full of bells and whistles that were compelling but not realistically usable.

WFG also wanted to use its gathered information to engage customers and prospects better and understand their needs through automated marketing. It began working with a high-cost marketing automation solution but found it couldn't properly integrate with CRM as it promised. As a quick fix, WFG then adopted a smaller marketing solution that still couldn't achieve its goals but was at least less expensive.

"We tried for years to build something as simple as a landing page to manage our customers' marketing preferences," said John. "But the system only allowed one preference page, and we have three divisions with different sets of user presences. They are different customers with different needs, and all data fields don't overlap."

At the end of the day, WFG just wanted an integrated CRM and marketing solution that would deliver on its promise to create automated efficiency.

Third Time's a Charm

WFG selected SugarCRM's on-premise solution over the enterprise competitor for a number of reasons. Not only was Sugar more affordable, but it also provided greater value in its ease of use with functional tools its teams could actually apply to the sales process. It also gave WFG the ability to customize and integrate other important systems without the need for a long, drawn-out development process.

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But even the best software is only as good as how people use it. WFG began using Sugar in the same way it used previous CRMs, leading to the same errors and inefficiency. It tried working with two different vendors to set up an initial integration but only made it about 90% through the process. On top of that, some salespeople still hadn't adopted the CRM in favor of their old ways and address books.

WFG did more research and found W-Systems, the then-largest global Sugar Elite partner. The company also decided to migrate to the cloud to take advantage of Sugar's quarterly updates and latest features. W-Systems helped WFG realize the value it was looking for by automating simple workflows with one-click buttons, merging documents, and adding integrations.

John and the team set out to show sales reps the full breadth of use cases they could achieve with Sugar Sell. They found they could even use it to track which campaigns were most effective and predict where the most engaged prospects were. Now with a full understanding of Sugar's capabilities, sales rep adoption has increased significantly, which management can monitor from daily reports.

"During any training session, we always remind the users that the CRM is here to provide information to them and not take time out of their day. By providing a little information, the system will bring you value, and in return, you'll get insights into your customer's behaviors and needs," said John.

WFG also adopted Sugar Market for an automated marketing solution that's seamlessly connected to Sugar Sell. Joey Elizabeth Grampa, VP, Agency Marketing Coordinator for MyHome, and her marketing team can access the customer data and reports it needs to create and gauge campaign success without logging in to Sell. At the same time, Sell receives the needed engagement information to provide the sales and management teams actionable data.

"Moving to a new marketing platform is never easy, daunting in fact. But Sugar made our transition to Market very easy. The development of new templates and workflows was simple. We quickly saw the benefits, and data we could finally capture. We also saw a dramatic reduction in the time our team spent sending campaigns for our sales teams," said Joey.

"The actionable data we get out of Market is incredible," said John. "Market is probably one of the biggest wins we've had with Sugar. I would tell anyone that doesn't have their marketing efforts and CRM directly integrated that they are missing opportunities and making more work for themselves."

The marketing team also integrated Oktopost to schedule and manage social media content with ease. The integration allows WFG to track and understand its campaign effectiveness, modify and optimize future programs, and conduct A/B testing, prompting increased customer interaction with emails and social posts.

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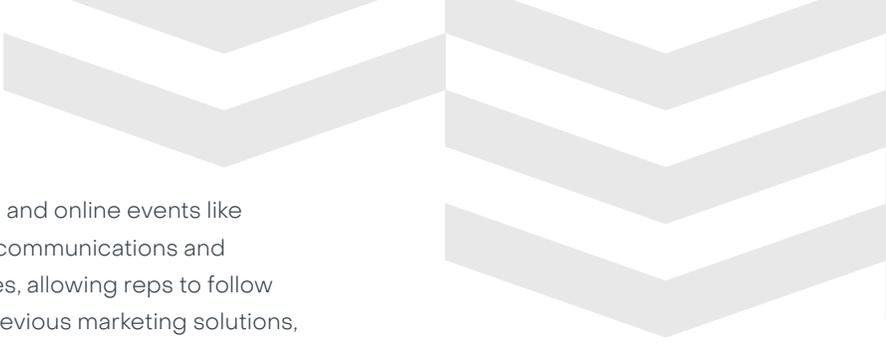
WFG has also seen increased engagement with in-person and online events like conferences and webinars. Instead of simply sending out communications and hoping for attendance, WFG can easily track response rates, allowing reps to follow up and understand why a customer didn't attend. Unlike previous marketing solutions, Market also gives the company visibility into unique opens so it can see individual engagement within each customer company.

Increased Adoption and Confidence

Since migrating to the cloud with Sugar, WFG has experienced a tremendous boost in efficiency, adoption, and ROI. Nearly 90% of WFG's Agency Division and Enterprise Solution sales force uses the CRM, representing a 45% increase in adoption.

Marketing has also seen tremendous results with Market, from increased efficiency to data visibility. Marketing now uses Sugar to create pre-defined templates for sales rep emails instead of building out individual messages with static unique details for each rep for each campaign. With Market and Sell integrated in one platform, marketing can create the template once and allow sales to select their personalization from a drop-down list, saving time and boosting marketing and sales efficiency.

"Marketing is so thrilled with the data and what their team can now do," said John. "They've got more time and are more efficient than they've ever been, allowing them to spend time developing more complex campaigns to improve our customer's experience."

System updates are also easier than ever with a cloud-based CRM. Unlike on-prem updates, which only happen once per year and take over a week to complete, Sugar's cloud updates are performed over the weekend, four times per year.

"It was painless, and we didn't have to tie up our infrastructure team all weekend doing it," said John. "It just happened and it worked."

WFG also appreciates Sugar's hands-on service to help it achieve its sales and marketing goals. Account managers regularly communicate with John and the team to suggest new campaign ideas and workflows.

"At Sugar, you're not a number; you're an actual human being," said John.

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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 or follow **@SugarCRM**.

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sugarcrm | **Let the platform do the work**

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