



CUSTOMER CASE STUDY

Eden Exchange Extends Sales Automation to Clients in a Single Platform



It's now second nature for people to buy and sell items online. But what about businesses? When Raghu Rajakumar looked to exit a business, he noticed the process was fragmented with no end-to-end solution available. That's when he started Eden Exchange, an online ecosystem for business buyers, franchisors, sellers, brokers and advisors to successfully transact without hassle. Today, the Australian company has global offices and partnerships across APAC, India, and the Philippines.

But "business matchmaking" requires a clear understanding of each party and a place to house the data. Eden Exchange's needs mirrored the functionality of a CRM — one with the ability to configure workflows for its unique business.

Industry ///

Professional Services

Location ///

Australia and New Zealand

Website ///

www.edenexchange.com

Buyers and Sellers Need Opportunities, Not Technical Hassle

Eden Exchange's marketing technology platforms were siloed across teams. The company began searching for a platform that could consolidate everything in one place.

Eden Exchange also recognized similarities between its clients' sales processes and its own. Like clients, Eden Exchange worked through an opportunity pipeline and required quoting and messaging workflows. More importantly, clients were entrepreneurs, not IT experts. Without technical knowledge, setting up workflows for each business in its portfolio would cost time and resources.

Eden Exchange found that [SugarCRM](#) not only had the ability to be configured to meet its needs, but integrate with their own platform. This meant it could pass Sugar workflow functionality along to its own clients, much like a white label tool.

Data in One Place Leads to Better Client Experiences

Eden Exchange now uses [Sugar Sell](#) for automation throughout the entire sales cycle. For instance, when buyers and sellers must sign non-disclosure agreements (NDAs) to learn more about an available opportunity, the Eden Exchange platform automatically triggers a workflow to obtain the necessary signatures. Instead of developing sales functionality on its own, Eden Exchange can build templates in Sugar that affect hundreds to thousands of clients.

"We had to set up the process flow once, but our thousands of customers just have to click a button," said Dhanush Ganglani, Managing Director and Co-Owner of Eden Exchange.

The company found Sugar easy to adopt thanks to a number of available resources and the ability for teams to visualize data in the proprietary platform. Now, Eden Exchange teams know they can find whatever they're looking for — and that it will be up to date — in a single source of truth.

Sugar integrations with apps like Zapier allow Eden Exchange to easily connect its numerous lead generation channels with the platform to track interested buyer and seller leads as they come in.


Keeping and visualizing data in one place has also given Eden Exchange a better understanding of how its clients use the technology. Whether they're simply browsing or searching for businesses in a particular sector, Eden Exchange can use the data it collects to improve the client experience and deliver more of what clients want.

"Sugar is so critical to our platform because of the number of workflows it drives, the big data it houses, and the lead scoring it offers," said Ganglani. "All of this plays a critical role in what we do for our clients and has a direct impact on our ability to deliver."

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Managing Director and
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“The ability to automate tasks and use process definitions has allowed us to take what was previously a manual task and save our team a lot of admin time that was previously being used,” said Isabel Dias, Chief of Marketing and Operations at Eden Exchange.

Eden Exchange Saves Thousands of Hours, Furthering Growth

Eden Exchange believes Sugar saves its teams thousands of hours setting up and monitoring workflows. With automation already built in Sugar, Eden Exchange can simply check a box to start using a new feature. As new users join the platform, from buyers and sellers to lawyers and accountants, Eden Exchange has confidence in helping them accomplish their goals in an easy-to-use environment.

“We bring them together through technology, and Sugar is the engine that powers it,” said Dias.

Going forward, Eden Exchange plans to continue building superior client experiences and ensuring the seamless flow of data between platforms and apps. AI will help the company accelerate growth through predictability, while lead scoring will assist teams when gauging the likelihood a buyer will decide to acquire a business. Because potential buyers look at multiple businesses, Eden Exchange can use a range of sophisticated data points to better formulate a score and direct them toward businesses that are best suited to their interests.

Eden Exchange is also looking into how AI can be harnessed to identify opportunities for increased sales and business efficiency. Either way, whatever functionality Eden Exchange benefits from, its clients will too.

“We have built our foundation so whatever may come from Sugar’s innovation, we can act as a partner and build off of it,” said Ganglani. “That’s where growth will come from.”

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—ISABEL D.

Chief of Marketing and Operations at Eden Exchange

About SugarCRM

SugarCRM is a CRM software that helps marketing, sales, and service teams reach peak efficiency through better automation, data, and intelligence so they can achieve a real-time, reliable view of each customer. Sugar’s platform provides leading technology in the sales automation, marketing automation, and customer service fields with one goal in mind: to make the hard things easier. Thousands of companies in over 120 countries rely on Sugar by letting the platform do the work. Headquartered in the San Francisco Bay Area, Sugar is backed by Accel-KKR.

For more information about SugarCRM, visit www.sugarcrm.com.