sugarcrm

FSIoffice Achieves 40% More Cases with Streamlined Sales Efficiency

FSI office

Achieving peak work performance requires a supportive environment, whether that's a collaborative team—or a comfy desk chair. Over the past 60 years, FSIoffice has grown to adapt to the changing work world, which now includes various types of workplaces, from traditional offices to schools and even remote spaces.

That's why its portfolio of solutions has expanded to include more than 40,000 different products, including office supplies, furniture, janitorial products, coffee and breakroom needs, and even printing and promotion. With more than 250 employees and nine distribution sites, FSIoffice is now one of the largest independent office supply dealers in the world.

But engaging 5,000 active customers requires more than passively promoting products. Previously, if the company wanted to know what its customers were buying or what their interests were, it required a tedious, spreadsheet-dependent reporting process. The company needed a better way to identify sales opportunities while simultaneously engaging its existing customer base of 20,000 contacts.

Industry ///

Wholesale

Location ///

Charlotte, NC

Website ///

www.fsioffice.com

Product and Company Growth Requires Proactive Selling

FSIoffice used its previous CRM, Goldmine, as more of a repository for information than a sales and prospecting tool. FSIoffice wanted to know and do more with the information it had in terms of both transactional purchase data and "soft data" like what products customers are interested in and why they may not be purchasing.

Reporting was a manual process that required importing data to a spreadsheet line by line. Even with reporting in hand, FSIoffice struggled to build a clear view of what its customers had or needed more of. This often led reps to react in real time to prospect and customer requests rather than proactively suggesting new products and generating demand. This also meant that sales didn't have a good way to promote new product lines as the company's catalog grew.

Without automation or integrated data, reps found it difficult to achieve peak productivity. Sales users often switched between multiple systems, including the company's enterprise resource planning (ERP) platform, to get the answers they needed.

FSIoffice turned to sales–i, a sales intelligence platform for selling smarter with actionable insights, better targeting, and automated efficiency. Plus, sales–i integrates with hundreds of different ERPs for seamless data flow.

sales–i also exclusively integrates with SugarCRM to create the most insight–based, high–impact opportunities possible. FSIoffice switched its CRM to Sugar for a way to quickly act on the insights sales–i surfaces based on integrated data in a single interface. It chose Sugar for the ability to:

- **Customize.** FSIoffice can handle a significant amount of customization itself without involving its developers.
- **Integrate.** SugarCRM integrates with a number of FSIoffice's other tools, making it easy and seamless to share and act on data across systems.
- **Report.** FSIoffice can generate reports and share with leaders for insights across the business. Sales–i's Campaign Manager tool filters for certain audiences that may be ready to purchase (e.g., customers who haven't bought paper in three months) and sends the information directly to Sugar Market for campaign follow up.
- **Automate.** Workflows are easy to set up and automate without help from a developer.

FSIoffice also initially chose Sugar for its affordability compared to other CRMs.

> "We struggled significantly to find products that integrate well with our ERP system. That has never been a problem with sales-i. It has been one of the most seamless and easy platforms for us to integrate with."
>
> **— BETH F.**
> EVP of FSIoffice

CRM and Transactional Data Together Create High-Impact Opportunities

Together, sales-i and Sugar automatically serve up sales and marketing opportunities based on the transactional and CRM data FSIoffice already has. With AI and machine learning, sales reps can identify new up-sell and cross-sell opportunities and immediately act on them by setting up campaigns in Sugar.

For example, when FSIoffice wants its reps to promote a new product category like coffee and breakroom supplies, Sugar can point them to the right accounts to focus on using sales-i data. Upon login, reps can easily identify which accounts aren't yet purchasing these items and begin interacting with those prospects and customers.

One of the biggest benefits of the integration is increased sales efficiency. Instead of logging into multiple systems to access important sales data or contact information, Beth and team can get valuable insights and act on them in one place. With all sales data and tools together, reps can send engaging communications and marketing resources to prospects and customers in just a few clicks, saving significant time. In fact, Sugar has contributed to account managers' ability to handle 40% more cases thanks to automated efficiency.

"The biggest change is efficiency," said Beth. "The resources really are at their fingertips."

This is especially helpful in reaching thousands of customers. Within each customer company, reps may interact with about 10 different buyers. In Sugar, users can see everything from who the contact for a specific product is to their most recent activity.

"That's one of the things I really like about Sugar — it's really easy to pull up relevant information," said Beth. "It's not something that takes up your whole day. Information is fed to them in little, bite-sized pieces."

Adding transactional data to the mix also allows FSIoffice to be more targeted in its approach. Now, sales can personalize marketing messages so communications are as engaging as possible. And with the ability to see past interactions, messages are also cohesive and relevant across the sales funnel.

Better Customer Experiences from Purchase to Delivery

FSIoffice is on a path toward digital transformation across its entire business. With Sugar as a true partner, the company has an extension of its team whenever it needs sales and marketing guidance. FSIoffice can simply turn to its account manager to help figure out the best way to use software to meet its latest challenge.

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FSIoffice also plans to stay true to its motto, "You will appreciate our service," by continuing to improve the entire customer experience, from product to sales to customer service. One of the ways it plans to improve the customer experience is with cases in Sugar Serve for support and even payment issues with accounts receivable.

From the time a customer places an order to when it's delivered, FSIoffice wants to create an automated system of accountability. With greater visibility for more users throughout the company, FSIoffice can document, track, and close the loop on customer interactions to provide the best customer experiences.

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SUGAR PARTNERS

CRM International Is a highly experienced SugarCRM reseller partner. We specialize in bringing CRM solutions to the office products reseller vertical market along with other high volume, 'repeat-sell' consumable products resellers.

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sales-i is a sales intelligence tool that ensures every sales conversation is insight-led and profitable. sales-i is the industry standard sales analytics platform for manufacturing, distribution, and wholesale businesses worldwide. sales-i integrates with SugarCRM to bring heavyweight sales analytics to Sugar customers.

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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.

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