

CUSTOMER CASE STUDY

Niftylift Elevates Efficiency with Automated Sales Quoting

niftylift

Service professionals rely on Niftylift to reach their work through mobile elevating machines like boom lifts, cherry pickers, and access platforms. As one of the industry's largest manufacturers of lift platform rentals, the company is also a pioneer and specialist in compact, low-weight machines that produce minimal environmental effects.

Yet, with over 550 employees serving 60 countries worldwide, Niftylift lacked a central place for accurate sales and service data. With information spread across shared drives, personal folders, and email chains, the company needed a CRM solution that could keep up with the impact of its global business.

Industry ///

Manufacturing

Location ///

Milton Keynes, UK

Website ///

www.niftylift.com

CRM Reassessment Prompts Cloud Expansion and Business Growth

Niftylift had previously invested in [SugarCRM](#). However, high ROI requires regular use, and the platform experienced low adoption across departments.

The company also wanted to shift its customer journey to the cloud for smoother customer interactions (like quoting) and mobile access while traveling. Niftylift decided it was time to reassess its CRM solution to better centralize data, improve process efficiency, and make smarter business decisions.

Niftylift (They) turned to London-based Sugar reseller [redk](#) for guidance and recommendations on upgrading to the cloud and accelerating its CRM use.

Disjointed Sales Data Leads to Slow and Inaccurate Quote Creation

redk set out to help Niftylift solve challenges around disparate data, low CRM adoption, and disjointed customer interactions. Plus, the sales team could not efficiently create accurate quotes or provide updates on repeat customers, which make up 75% of the company's sales.

To ensure Sugar was still the best platform for Niftylift's needs, redk worked closely with the company's leaders to develop a strategic plan. Together, they identified goals around modernizing and optimizing processes. For instance, Niftylift's highly mobile sales force needed an easy and reliable way to consult and update sales data while creating professional quotes from anywhere. All quoting and pricing were previously done manually in disconnected spreadsheets, documents, and emails. This made the process difficult to update and prone to errors.

Niftylift also needed to respond to fluctuations in the market thanks to new tax incentives for buying plant machinery. This encouraged customers who would normally rent or purchase second hand equipment to purchase new from Niftylift. With more leads coming in than ever, Niftylift's sales team struggled to quickly assign reps and personalize communications.

Digital Transformation and Best Practices Lead to Smoother Quote Creation

First, redk guided Niftylift through the process of migrating to the cloud to enhance its use of Sugar. redk then worked with Niftylift to implement CRM best practices, making it possible to transition into a fully digital business cycle, particularly around customer acquisition and customer retention.

"Sugar provides Niftylift with a 360-degree view of each client, as well as a way to automate quote creation within the platform."

With personalized solutions from redk, Niftylift now has a custom pricing tool, optimized logistics, and a better way to build quotes. Niftylift can easily create quotes with a single process across all regions using templates in Sugar.

Sugar provides Niftylift with a 360-degree view of each client, as well as a way to automate quote creation within the platform. Niftylift can store data and customer insights in one place, making it easily available for follow up and analysis. As agents coordinate with business leaders, processes are synchronized, offering up-to-date information to the customer service team to improve the entire business cycle.

Automated Sales Processes Improve Efficiency and Data Quality

Today, Niftylift has a central database and standardized commercial processes, resulting in a more complete picture of the customer journey. It has operational processes that better align with the needs of the business. Plus, it has digital platforms to drive performance and be more competitive.

Automating and mobilizing key sales processes has enabled Niftylift to improve its agility and impact nationwide. Since implementation, Niftylift has achieved positive impact in some sales lines, as well as a major improvement in data quality compared to the previous year. Instead of calling or emailing sales admin staff to update customer information while on the road, Niftylift sales reps can simply input the data themselves through cloud and mobile access.

The experience has given Niftylift a blueprint for success when implementing technology. Going forward, Niftylift has goals for larger improvements and plans to work with redk again for process management.



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At redk, we are determined to make your business successful. The first step in our approach to CRM is understanding and adapting our solutions to your core business strategy and objectives. Our ultimate goal is to seamlessly align our technology with your business plan so you can reach your objectives. Our services help you close the gap between digital customer-driven strategy and tactical and operational execution.

www.redk.net // sales@redk.net

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.