

# Keller-Heartt Company Uses SugarCRM to Shine a Light on Their Sales Process

## Company Profile

### Table of Contents

Company Profile.....	1
Business Situation.....	1
Technical Situation.....	2
Solution.....	3
Benefits.....	3
About Technology Advisors.....	4

Keller-Heartt is a full-service company recognized as a leader in the Lubricant and Absorbent industry. It has a highly-qualified, experienced staff that pays close attention to customers' lubrication requirements. The skilled technical and logistic professionals at Keller-Heartt service customers throughout the Continental United States, and meets urgent delivery needs in Chicago and Northwest Indiana areas with its own truck fleet. Keller-Heartt prides itself on superior service in all areas of petroleum.

### Company Stats:

- Industry: Lubricant and Absorbents
- Eight truck fleets operating in Chicagoland and Northwest Indiana
- Number of Employees: 30; 15 in sales and marketing

## Business Situation

Prior to its implementation of SugarCRM, Keller-Heartt had no formal customer relationship management (CRM) system in place. Brian McGrath, the President of Keller-Heartt, believed it was that complete lack of visibility that prompted them to reach out to Technology Advisors Inc. (TAI).

During the initial assessment, TAI discovered several opportunities for improvement over Keller-Heartt's current, manual, decentralized system, and after discussing this roadmap with Keller-Heartt team, TAI knew the best practice would be to implement "crawl, walk, run" adoption.

**“I like the fact that the software’s not tied to a certain piece of equipment. It lets you look things up online from anywhere.”**

**- Brian McGrath**

The first priority was to reduce the risk of attrition of the Keller-Heartt sales team by implementing the sales force automation (SFA) tools available in SugarCRM Professional. Once visibility and accountability were achieved, the Keller-Heartt team would have the perspective they required to pursue opportunities more thoughtfully and successfully. It’s this prescriptive sales methodology that allows Keller-Heartt to successfully deliver such a robust catalog of goods and services to their customers.

**PROJECT OPENING DESIRE:** Keller-Heartt engaged TAI to implement Sugar OnDemand because the company wanted all of the sales-related information housed in a single, web-accessible location.

## Technical Situation

Since Keller-Heartt wasn’t migrating from a formal CRM, Lan Luo - the TAI Consultant - began by identifying all the data repositories that would be in play. As is common in this situation, the team’s data was spread across many different applications, devices, methods, and minds. The sales team was most excited about the social media features SugarCRM would deliver; and the impact those features would have on their prospecting efforts is what got them on board.

The Keller-Heartt sales organization goes to market armed with a very robust catalog of products and services. Consequently, they required a tool that would help the team ensure they could deliver every component their customers need in the first transaction. This meant SugarCRM would need to integrate with their ERP solution (ERP 100 formerly known as MAS 90). This would allow sales reps to confirm inventory, to be contextually aware of the products being offered, to highlight cross-sell demands, and - over time- to receive feeds from the Keller-Heartt E-Commerce solution, thereby allowing the team to identify up-sell opportunities as well.

**“We knew there were a lot of opportunities for improvement... from creating a single window for data, to integrating additional systems like ERP and E-Commerce...the Keller-Heartt team had the wisdom to start small and increase value as the implementation matured.”**

**- Lan Luo**

**PROJECT EYE OPENER:** The Keller-Heartt team showed enthusiastic interest in SugarCRM’s social features almost immediately; Lan Luo applied this enthusiasm to the data collection efforts.

## **Solution**

Technology Advisors understood the challenges that a company new to CRM would face and used experience to develop and deliver a solution that addressed both Keller-Heartt’s immediate needs, and defined a roadmap which will apply SugarCRM’s more sophisticated features as time goes on. In the initial deployment, Lan created an SFA solution consisting of four modules: accounts, opportunities, leads, and contacts.

Today, the Keller-Heartt salespeople maintain up-to-date records in SugarCRM and rely on the CRM to make and keep appointments with their clients. This action is made possible by the On-Demand deployment of SugarCRM, which allows them to access the system from anywhere, even on the go.

## **Benefits**

Since TAI rolled out SugarCRM, the Keller-Heartt management team has enjoyed improved pipeline management. The leadership team is able to “just go online and check on their account base.” Brian McGrath also notes that “with Sage/Act, people were blind to each other’s stuff, now we can see it all.”

The Keller-Heartt sales organization no longer steps on each other’s toes but instead has the freedom to focus on making their clients successful.

Because of the integration with their MAS 90 inventory system, the team can sell even the most “nifty” of the Keller-Heartt product catalog with confidence because SugarCRM shows them if items in question are in stock. This ties to one of Brian’s most concerning KPIs: close rate. With the ability to see if sales reps are adding all the ancillary products and services they should, Brian and his team can better understand what it really takes to hit their target numbers.

**“Support from Technology Advisors has been crucial; they related to our staff in a user-friendly way.”**

**- Brian McGrath**

All in all, Brian - and the entire Keller-Heartt team - finds the visibility gained since the implementation of Sugar-CRM to be the biggest benefit, and he looks forward to continuing this journey with the TAI team during future phases of the project.

## **About Technology Advisors**

Technology Advisors (TAI) is a global business and technology consulting company specializing in the development of Customer Relationship Management (CRM) processes and technology solutions. Since 1991,

our customized strategies have helped more than 2,000 businesses increase sales, boost productivity, and improve profitability.

We work with companies globally on consulting, project management, marketing automation, sales automation, customer service and support, field service, call center optimization, analytics, and mobile and social solutions. Our expertise spans a wide-range of markets including government industries, financial services, property, healthcare, manufacturing, and construction.