



# AMP READS BETTER WITH SUGARCRM

AMP



Some eat steak.  
We eat software.

WE EAT  
SOFTWARE

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# SMART BUSINESSES CHANGE WITH THE TIMES. WHEN AMERICAN MARKETING & PUBLISHING (AMP) WAS FOUNDED IN 1997, THE INTERNET WAS STILL A RELATIVELY NEW CONCEPT. AS THE WORLD MOVED ONLINE, AMP ADAPTED THEIR PRODUCTS AND STRATEGY FOR AN INCREASINGLY DIGITAL MARKET.

Unfortunately, their older, print-focused CRM lacked many of the features the company needed to sustain its growth.

In 2018, AMP began working with FayeBSG to create a modern, fully-customized SugarCRM solution. The results were impressive.

45%

**INCREASE**

IN FIELD OPTIMA SALES

97%

**DIGITAL CONTRACTS**

PROCESSED ELECTRONICALLY





# CHALLENGES

When American Marketing & Publishing (AMP) began publishing business directories in the late 1990s, print was still king. The internet was still in its infancy, with most companies having no significant online presence. Online directories like Google, Facebook, and Yelp didn't exist yet, and the earliest versions of today's smartphones were still a decade away. If you needed to find anything — from the address of a pizza place to the phone number of an emergency plumbing service — you were going to need a phone book.

Not surprisingly, businesses across the country relied on phone directories to reach their customers. In addition to having their basic information listed, businesses could also advertise in these directories, helping them reach even more customers. For many rural businesses in the Midwest, advertising in one of AMP's 500 regional business directories was easily their most effective annual marketing investment.

But times change. Print directories were steadily becoming less and less competitive against their internet rivals, and AMP decided that it was time to start developing new products for the online age. As they began developing their digital offerings, however, AMP realized that their older, print-focused CRM system simply wasn't capable of meeting their future needs.

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**“WE WERE TRYING TO BACK-ENGINEER OUR OLD SYSTEM FOR NEW DIGITAL PRODUCTS,” SAYS JOLINE STAEHEL, AMP’S CO-FOUNDER. “WE SPENT A LOT OF MONEY TRYING TO UPDATE IT, BUT THAT SYSTEM WAS DESIGNED FOR THE DEADLINES OF THE PRINT INDUSTRY. THAT’S NOT THE WAY THE DIGITAL WORLD WORKS AT ALL. WE HAD ALL THESE NEW PRODUCTS, AND THAT MEANT THAT WE HAD TO CHANGE THE ENGINE THAT DRIVES THE BUSINESS.”**

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# CHALLENGES

After considering a variety of options, including Salesforce and Microsoft Dynamics, AMP decided to go with SugarCRM due to the flexibility of its open-source platform.

During her research, Staeheli learned about FayeBSG, a company with a long history of building CRM systems to fit unique challenges and use cases.

Given that AMP was on the verge of completely changing the focus of their business, SugarCRM seemed like a good fit for their new direction. As Staeheli recalls:

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**“I FELT LIKE WE COULD REALLY PARTNER WITH FAYEB SG TO BUILD A SYSTEM THAT WAS GOING TO WORK FOR OUR CHANGING BUSINESS.”**

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# SOLUTIONS

Although they have more than 50,000 customers in a 12-state area, AMP is still a relatively small operation. The company has around 350 employees, with about 160 of those being dedicated salespeople. To do their jobs efficiently, AMP's workers needed a robust set of tools that were specialized for both acquiring new customers and maintaining existing customer relationships.

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**“OUR OLD CRM WAS LIKE A BLACK BOX,” RECALLS STAEHEL. “YOU COULDN’T GET ANYTHING OUT OF IT. WE HAD TO BUILD AN EXTRACTION PROGRAM JUST TO GET OUR OWN DATA OUT OF IT. WE ALSO HAD A LIMITED NUMBER OF LICENSES FOR THAT CRM, MEANING THAT WE HAD TO PUSH DATA OUT INTO DIFFERENT PORTALS JUST TO GIVE PEOPLE ACCESS TO THEIR OWN REPORTS. OUR SALES REPORTS WERE SOMETIMES 24 HOURS OLD BY THE TIME WE GOT THEM BACK. IT WAS REALLY PROBLEMATIC.””**

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After adopting SugarCRM, those ongoing problems that had plagued AMP for years quickly evaporated. Sugar allowed AMP to have the data stability and system flexibility to build out its own e-contracting order system, which integrates with CRM platform and data.

Generating new reports now took seconds instead of hours, making life much easier for the sales support and customer service teams. For the first time, AMP had both total control and instant access to their data.

But the biggest impact was on their sales teams.





# SOLUTIONS

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“WE HAVE A REALLY INTENSE SALES CULTURE,” STAEHELI SAYS. “OUR SALESPeOPLE ARE CONSTANTLY MAKING CALLS – ABOUT 40 SALES CALLS A DAY – AND THAT’S A TOTALLY DIFFERENT APPROACH TO HOW A LOT OF OTHER COMPANIES HANDLE SALES. WE ALSO DON’T DO A HUGE AMOUNT OF PLANNING, AND WE DON’T SPEND A LOT OF TIME ON THINGS LIKE SETTING APPOINTMENTS. OUR TEAMS ARE OUT THERE POUNDING THE PAVEMENT.”

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While AMP’s executives were excited about updating their technology, many of their salespeople were less than thrilled about learning an entirely new system. As flawed and inefficient as it was, the staff understood the old, paper-and-spreadsheet based system they had been using for years. Initially, the company struggled with getting these status-quo favoring employees to fully adopt the new CRM.

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“AT A CERTAIN POINT, WE DECIDED TO START TALKING WITH THEM ABOUT WHY THEY DIDN’T LIKE USING THE CRM,” STAEHELI EXPLAINS. “WE LISTENED TO WHAT THEY HAD TO SAY. THEN WE DECIDED TO ASK THEM ABOUT WHAT PROBLEMS THEY WOULD LIKE THE CRM TO SOLVE.”

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# SOLUTIONS

As it turns out, the sales teams did have one big headache that they needed help with: They dreaded writing and rewriting contracts. Most of AMP's customers order multiple products from them, with each one requiring its own contract. Writing the same information over and over on paper contracts was a real chore, and the sales teams were desperate for a better option.

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“OBVIOUSLY, OUR SALES PEOPLE HATED ALL THAT PAPERWORK,” SAYS STAEHELI. “OUR BIG HOOK WAS THAT IF THEY DID EVERYTHING FROM INSIDE THE CRM, THOSE DIGITAL CONTRACTS WOULD AUTOMATICALLY FILL ON ALL OF THE ACCOUNT DETAILS FOR THEM. IT TOOK ALL OF THAT WRITING OUT OF THEIR WORK, AND INSTEAD OF TAKING 15 MINUTES TO FILL OUT A CONTRACT, IT TOOK ABOUT 30 SECONDS.”

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By pairing their CRM with mobile devices, the sales staff could also take payment on the spot. Unlike the old paper-based system, which required several days to process a customer payment, the new CRM handled it instantly. This allowed the sales teams to get their commissions almost as fast as they could sell.

Instead of dragging their feet to adopt the new CRM, the sales staff soon became enthusiastic supporters. As Staeheli recalls, “Those were the two big wins for the CRM.”



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## LASTING RESULTS

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**“THE GREAT THING ABOUT WORKING WITH FAYEBSG IS THAT WE DON’T HAVE TO RE-EDUCATE THEM ABOUT OUR SYSTEM EVERY TIME WE NEED SOMETHING FIXED OR ADDED TO THE CRM,” SAYS STAEHLI. “THEY UNDERSTAND OUR BUSINESS, AND THEY CAN GET TO THE HEART OF WHAT WE’RE REALLY ASKING FOR. THAT’S BEEN REALLY, REALLY VALUABLE TO US.”**

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One of the primary goals AMP had for their new CRM was the ability to centralize their data, allowing it to be easily accessed by anyone, and in real time. By working with FayeBSG to design a CRM that fit perfectly with their workflows and other software, AMP was able to take a big step in the right direction. Two years later, AMP is still seeing the benefits.

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**“SUGARCRM TURNED OUT TO BE GREAT FOR OUR REPS,” STAEHLI SAYS. “THEY USED TO HAVE ALL KINDS OF PROBLEMS WITH THEIR CONTRACTS, LIKE MISSING IMAGE FILES FOR DIRECTORIES OR DETAILS GOING INTO THE WRONG PLACES. NOW, THEY JUST PUSH A BUTTON ON THEIR SUGARCRM DASHBOARDS, AND THEY CAN IMMEDIATELY SEE IF THERE ARE ANY PROBLEMS. IT USED TO TAKE A TON OF PHONE CALLS TO RESOLVE THAT STUFF, BUT NOW THEY CAN DO IT ON THEIR OWN.”**

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# LASTING RESULTS

In fact, the CRM has changed things for the better across the entire company. For example, the sales support staff now spend far less of their time on simple-yet-time-consuming tasks like looking up account balances for the sales team. The CRM has also been fully integrated with AMP's ERP system, making their accounting and administrative work much faster, easier, and efficient.'

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**“ONE OF THE THINGS YOU HEAR ABOUT CRM USERS IS THAT THEY DON'T KNOW WHAT THEY WANT,” STAEHELI SAYS. “THEY THINK THEY KNOW WHAT THEY WANT, BUT THEY'RE NOT PARTICULARLY GOOD AT DESCRIBING IT. FAYEBSG HAS BEEN REALLY GOOD AT TRANSLATING WHAT WE SAY WE WANT INTO A CRM THAT WORKS THE WAY WE NEED IT TO.”**

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Another major benefit of AMP's partnership with FayeBSG is the ongoing refinement of their CRM. As the company's staff gains more experience with the system, they have been able to make specific requests for new features, more streamlined workflows, and improved functionality. Even relatively small changes to user experience (UX) can result in serious efficiency and quality-of-life enhancements for users.

For example, AMP's sales teams had long complained that the default CRM fields for adding notes to prospect and customer records wasn't robust enough. By making relatively small changes to the code, FayeBSG was able to deliver a feature that saved employees a significant amount of daily hassle. Other features, such as automatically adding comma-separated values and pre-populating common text fields, have enabled workers to significantly increase the speed of record entry. Combined with FayeBSG's ongoing training and product support, AMP now has a CRM solution that everyone at the company benefits from.



# LASTING RESULTS

FayeBSG also helped AMP replace a legacy system that was not connected to the CRM with a task management fulfillment engine.

“Building this within the CRM allowed us to remove redundant data inconsistencies, and manage a customer “journey”, sales order through product fulfillment, in one system,” Staeheli says.

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**“THIS GAVE US DATA TRANSPARENCY TO SEE WHERE A CUSTOMER WAS AT IN THE SERVICING TIMELINE, ALLOWED US TO COORDINATE SALES AND FULFILLMENT EFFORTS, AND PROVIDED THE FLEXIBILITY TO UPDATE PROCESSES IN ONE PLACE AS OUR BUSINESS CHANGES.”**

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“Now that I’m familiar with the new system, I love how easy it is to navigate through tabs without messing anything up. Overall, I think Sugar is going to be super effective in terms of streamlining all of our processes.” - **IRIS**

“I feel like everything just loads faster in Sugar.” - **DEVLYN**

“One thing I like about using Sugar is how easy it is to reschedule a customer to check back on later, or for a call back.” - **MICHAEL**

“I like how easy it is to leave notes in Sugar!” - **MORGAN**

“I am finding myself moving faster today in Sugar than I did yesterday!” - **CHERYL**



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FayeBSG is a global technology company that helps companies grow by successfully creating, customizing, implementing, and managing industry leading customer experience, CRM, and ERP software platforms to meet ever evolving business needs.

As a SugarCRM Elite partner and awarded the 2020 SugarCRM Global Reseller of the Year, FayeBSG is also a leading partner with Sage, Zendesk, Ytel, Hubspot and a variety of custom software solutions. FayeBSG is known for their SugarCRM integrations with Sage 100, Quickbooks, NetSuite, Acumatica, Intacct, Constant Contact, Authorize.Net, Hubspot, Ring Central, Box, Jira, Ytel, and more. Services include project management, software implementations, consulting, training, custom development, and support. Specializing in software implementations for a variety of industries, FayeBSG has customized successful CRM, ERP and Marketing Automation platforms for a variety of mid-market and enterprise businesses.

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