



ADVOCATE CONSTRUCTION BUILDS BETTER WITH FAYE



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HOW ONE COMPANY WENT FROM A FAILING CRM TO FINDING HOLISTIC TECHNOLOGY SUPPORT

It takes both professionalism and industry experience to build the kind of success that Advocate Construction has seen over the last decade. Founded in 2012, Advocate began as a small Illinois-based roofing company that combined high-quality, professional service with a strong understanding of insurance company requirements. As a result, Advocate became the go-to repair contractors for anyone with a storm or hail damaged roof.

From those humble beginnings, Advocate Construction has since grown into a thriving mid-sized business with offices and teams in six midwestern states. The company has also branched out from roofing, and now offers a range of services, including siding, gutters, driveways, and solar panel installation. But rapid success also comes with unique challenges.

Like many fast-growing companies, Advocate soon faced an unexpected problem: Effectively managing their customer, sales, and other business data. As the company expanded into new regions, the amount of data it generated grew exponentially. Without the right customer relationship management (CRM) solution in place, Advocate's technology infrastructure couldn't scale to meet the needs of their operation.

They were stuck in a bottleneck, and it was starting to impact the company's growth.



CHALLENGES

"It started with a bad build of Sugar," explained Doug Cooper, Advocate Construction's co-founder and president. "We originally went with a Sugar partner that built our system using the old, open-source version of Sugar. That software hasn't been updated in years."

"WHEN WE DECIDED TO UPGRADE THE CRM, WE REALIZED THAT WE WERE IN TROUBLE."

This placed Advocate in the awkward situation of being fully committed to the Sugar platform, but being unable to upgrade and modernize their system. All of their customer and sales data was locked away in an outdated and unsupported version of the software. To make things worse, some parts of their CRM were no longer functioning.

"IT WAS BAD NEWS," SAID COOPER. "WE WENT TO SUGAR FOR HELP BECAUSE WE REALLY NEEDED TO FIND A NEW CRM PARTNER THAT COULD HELP US MOVE TO THE ENTERPRISE VERSION."



CHALLENGES

Transitioning their CRM to the community version of Sugar was just the first step in Advocate's long-term plans. They also needed an implementation partner that could help them overhaul their entire CRM workflow, rebuilding old systems and rethinking outdated processes. They needed a CRM that could grow with their company, adapting and scaling with a minimum of both cost and headaches.

How does one find that kind of CRM partner? The typical process can take months, with clients spending hours interviewing, vetting, and negotiating with potential partners. In Advocate's case, however, things were a little less complicated.

"I had searched for several companies through the SugarCRM partner website, and I just started calling people or filling out their lead forms," said Cooper.

"JASON (JASON GREEN, PRESIDENT AT FAYE) CALLED ME BACK WITHIN 30 SECONDS. THE TEAM WAS VERY RESPONSIVE."



SOLUTIONS

While the immediate goal was the migration of Advocate's unsupported "community edition" version of their CRM to the fully supported Sugar Enterprise edition, this was just one step in a much larger project. The company needed more than just a quick fix, it needed a CRM implementation partner that would be ready to completely overhaul their customer and sales technology.

"[Faye] came into our office, and they listened," said Cooper. During those conversations, Faye's team began the process of mapping out a new workflow that could incorporate the tools and systems that Advocate already had in place. "The team made it so that we didn't have to make a big leap after migrating the customer data. It enabled us to feel like Sugar was a useful tool instead of a regrettable decision."

Another priority was improving the company's reporting and analysis systems. Advocate's leadership team already had some experience with Sugar's reporting tools, and they wanted to use the insights in the updated version of those reports to optimize their workflows. As Faye began to integrate their updated SugarCRM implementation with the company's other systems, their reporting became even more robust and actionable.

SOLUTIONS

“WE STARTED COMING UP WITH CRAZY IDEAS OF HOW WE COULD USE SUGAR’S REPORTS TO DO THINGS BETTER,” SAID COOPER.

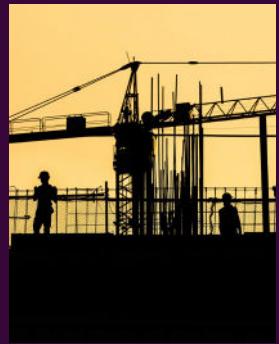
“It evolved into everybody on the team having new ways to contribute, and learning more about what’s possible with the CRM. That also helped to make the case for further investment in Sugar, because we could already see that there was going to be a return. The result is always going to be a better experience for employees and customers.”

Now that the underlying frameworks were in place, Faye could begin to focus on meeting Advocate’s long-term goals for their new CRM. The next several months were spent training the staff, fine tuning the user experience, and streamlining old workflows to improve the efficiency of their Sugar implementation. Advocate needed more than just a new CRM, after all. They needed a CRM that could keep up with the company as it expanded into new markets.

In a matter of months, the outcome of Advocate’s CRM investment was already becoming clear.



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LASTING RESULTS

The ability to scale is the biggest change from how things were before Sugar," said Cooper.

"THERE WAS NO WAY WE WOULD HAVE EACH SALESPERSON THAT COULD SERVE 200 CUSTOMERS EACH. WE CAN NOW THANKS TO FAYE."

Every part of Advocate's operation now relies on Sugar. This even includes the accounting team, which uses a Sugar-powered QuickBooks integration. The company's CRM isn't just another business tool, it's an integral piece of their success.

Sugar gives us the ability to have visibility into our sales, workflows, and timelines," said Cooper. "Every one of our business teams uses the CRM for something. It allows them to dial into the details at every stage of the process, and to come up with solid information that we can use to coach our people. It allows us to continually improve the knowledge and understanding of our business. And it does all that using the same software that we use every day for customer service.



LASTING RESULTS

Over the past few years, Advocate's partnership with Faye has even grown beyond their CRM to include SEO, marketing, and other ongoing services. Advocate Construction has signed up for Faye's AXIA annual subscription, which helps clients get the most out of their technology, from tools to help increase user adoption to enhance productivity to premier support and more.

The relationship between Faye and Advocate Construction is a solid and rewarding partnership. In fact, Cooper is even willing to put a dollars-and-cents value on it.

"Before we started with Sugar, our revenues were approaching \$14 million a year," Cooper said. "We've increased every year since. We're probably going to do more than \$50 million this year. Sugar and Faye allows us to accomplish more with less effort."





At Faye, we love software. We eat it, breathe it, and built it. Our mission is to make the best software in the world even better by helping clients lead the way with software strategy, deployments, integrations and technical support.

With us is better than without us. As an Inc. 5000 award winner seven years in a row, we help mid-market and enterprise clients globally achieve up to 10x productivity returns by leveraging the hidden potential within Zendesk, SugarCRM, Salesforce, HubSpot, and more.

There is no ceiling to what we can achieve with a lot of caffeine and an uncompromising commitment to make software better. We are intensely passionate about eating your software complexity and challenges, so that you don't have to.

Our flagship offering, AXIA by Faye™ bundles our IP, capabilities and pre-built software enhancements into one monthly or annual subscription. The result - A partnership that drives lasting value and optimization even as you grow.

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