

THIS IS HOW i CRM: **Audio Visual Design Group** Amps Up Business



AUDIO VISUAL
Design Group, Inc.

INTRODUCTION

When Tom Mattley came on board to grow Audio Visual Design Group (AVDG) into a powerhouse corporate design and installation company, he knew a solid, agile customer relationship management system was crucial for business maturity.

As CFO and Operations Director, Tom thought about costs and processes as he looked for a CRM that would increase efficiency and help steer business growth.

Tom's operations director perspective required a CRM that would govern workflows, foster transparency throughout the team, integrate with specialized design software, and chart the customer journey from opportunity to sale to installation and service.

His CFO side wanted affordability in a platform that wouldn't suck away profits with each software update.

After careful research, and drawing on his experience as global IT manager at Oracle, Tom chose Sugar as the central sales and process management resource for the growing company.

Today, he proclaims victory on all sides, with the company using Sugar in sales, operations and technical services.

Tom says: "Over the past four years, revenue is up 20X, while sales and installation teams have grown only 10x. During that time, the number of operations staffers, who handle administration and finance, has remained the same because of Sugar's efficiencies."

"Sugar is our one source of all truths," he adds.

ABOUT AUDIO VISUAL DESIGN GROUP:

Description:

Founded in 1996, Audio Visual Design Group is a leading design-build firm specializing in audiovisual systems for conference, presentation, education and collaboration spaces worldwide. The company was recently awarded the Samsung Smart Signage Award for Education Installation of the Year for a project at the Stanford Bioengineering Department that involved syncing 50 screens for academic presentations.

Headquarters:

San Rafael, CA

Founded:

1996

Customers:

TPG Global, Wells Fargo, Alibaba, Mozilla, Pinterest, Google, California Department of Water Resources, Travis Air Force Base

Website:

<http://www.avdg.com/>

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CHALLENGE: Implement an affordable and agile enterprise-wide CRM that creates transparency and improves workflow across teams; has flexibility for an array of customizations and integrations; drives customer-facing uniformity and improves financial forecasting.

SOLUTION: Sugar Enterprise, hosted on-site via partner, deployed to 100% of employees.

RESULTS: • Achieved 20X sales growth, without expanding operational costs • Improved financial forecasting • Consolidated processes to map the entire customer journey

CREATING CONSISTENCY AND TRANSPARENCY

Like many maturing businesses, AVDG's rapid growth demanded processes evolution, better forecasting and accountability.

During its formative years, AVDG initially used Microsoft applications to manage customer information via spreadsheets and emails. As the company grew, the inherent problems with this approach became apparent: spreadsheet files didn't get updated or shared widely, and emails got waylaid in individuals' inboxes. Management couldn't be certain that all customer-facing employees had the current version of the contract, installation agreement or specifications.

Setting out to find a CRM to solve its basic contact management concerns, AVDG first decided on Salesforce. But, high licensing costs and a lack of flexibility drove Tom to seek another, more enterprise-ready solution. In addition, he wanted an on-premise hosting option – either in-house or with a partner -- instead of being tied to a cloud-based platform, as dictated by Salesforce.

"With Sugar, we can host and make any modifications based on business needs," Tom says. "Salesforce doesn't allow that: it pigeonholes you into a mass application."

Tom needed an enterprise platform that worked for all his teams, one that provided the transparency and process management to drive the entire business efficiently.

"There is a whole host of information we have to share – sales, financial, technical services and implementation. That was the key indicator for us in choosing Sugar," Tom says.

"In Excel, we might have had a document with 2,000 line items and if someone made a change, it got sent out to everybody. But if somebody was working on a different version, the update could be easily missed. Sugar was our solution," he says.

"Sugar is our one source of all truths."

Tom Mattley,
CFO/Operations Director



In addition, AVDG wanted to standardize the company image and processes among customer-facing departments. Using Sugar to automatically generate quotes enabled AVDG to create uniform proposals, track them through approvals and log the customer's acceptance via DocuSign, an electronic signature application.

"With Sugar, we show we are a substantial and professional company, because we are able to present standard proposals, standard language, and the same layout. We wanted a branded look that showed we knew what we were doing," Tom says.

Today, the sales team uses Sugar to track the entire customer journey.

"They're finding leads, entering information; tracking their contacts, tracking their leads, tracking opportunities; looking at their pipeline. We have the whole sales front end," says Tom. "Once we produce that proposal and get an agreement in place, we are off and running with the financial side and the account management piece, both in Sugar."

But it didn't start that way in sales when AVDG first implemented Sugar.

As in many businesses, the sales team was typically overburdened and moving too quickly to set aside time for introducing new processes and record-keeping. For them, Tom created an effective and clever solution:

"We started calculating sales commissions in Sugar. The sales team then led the way to adoption."

A MANAGED PROCESS

AVDG's technical staff, which includes programmers, engineering teams, project managers and audio-video technicians, uses Sugar and integrated applications to design custom room installations.

When developing a proposal for a new installation, a custom Rooms Module gives engineers and technicians the ability to create scaled drawings of the project rooms and overlay all components via an integration between Sugar and a design application called D-Tools. This integration then creates a materials list for the job that runs from full wall-width video screens down to the exact number of cable ties.

That document becomes the proposal the sales staff presents to the client. Once approved, the document shifts to become the work list through which the technical staff taps into the Sugar-loaded product catalog to fulfill the job's materials requirements.

"We've been doing it this way for so long now, I know it saves us time and ensures accuracy in our proposals. That means a lot," Tom says.

Sugar provides consistency across departments and throughout a customer lifecycle that lasts years.

"We are basically a construction company. So as we get leads that run into opportunities

"My goal is to have Sugar drive the business. The intelligence we gain from the system can help drive smart decisions across our organization."

Tom Mattley,
CFO/Operations Director

HOW I CRM: FROM PROPOSAL TO DELIVERY

The technical team at AVDG also serves as the purchasing managers for each custom job. This dashboard keeps purchasing activity on track, on time, and on budget.

- Required materials: Shows real-time reports that output list of required materials for specific jobs over a selected period of time.
- Need by: Draws from Rooms Module to set delivery deadlines.
- Vendor: Products ready for purchase are grouped by vendor, showing "need by" dates, and required quantities and total pricing.
- Purchase Orders: Creates auto-generated orders based on needs and vendor, and generates email to each manufacturer.

and jobs, it works its way through Sugar until the project is completed. There isn't a department that doesn't use Sugar heavily," says Tom. "When you come on board, you get a Sugar account."

Using Sugar's functionality, AVDG also has improved revenue forecasting: it draws on sales in the pipeline, overlays its close rate and factors in its 90-day close cycle.

"Our Sugar forecasting is so detailed and accurate, even our investors were impressed," Tom says.

PLANNING FOR MORE WITH SUGAR

The more Tom finds ways to use Sugar, the more staff embraces the possibilities.

"We're about 75 percent there, and the adoption level has been going up and up. With every new user, we keep showing that Sugar makes everybody's job easier and makes them more effective. Each time we get one more person on board, it brings everybody else up another notch," Tom says.

Among his plans: Integrating the company's document archiving software; creating a customer portal, so customers can file service requests and self-service for common issues; and implementing a customer service case management system.

"My goal is to have Sugar drive the business," he says. "The intelligence we gain from the system can help drive smart decisions across our organization."

SOLUTION PARTNER



Audio Visual Design Group's customized Sugar deployment has been developed, implemented and managed by Cynergy Solutions.

Cynergy Solutions is a management and technology consulting firm specializing in the delivery of CRM, collaboration, communication and integration solutions. With experience in real estate, entertainment, media, professional services, retail, telecommunications, healthcare, manufacturing and distribution, among others, Cynergy Solutions understands that each business is unique. Based on that philosophy, Cynergy Solutions delivers flexible, scalable and adaptable solutions.

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CUSTOMIZATIONS AND INTEGRATIONS

INTEGRATIONS

- **D-Tools:** Industry-specific tool to design and audio-visual systems and specify materials and components drawn from Sugar-incorporated hardware and materials catalog; can be used to generate multiple rooms from a single input file.
- **QuickBooks:** Integrated with Quotes Module for invoicing.
- **DocuSign:** Electronic signature application for contracts.

CUSTOMIZATIONS

- **Rooms:** Created for corporate audio-visual system design. Interfaces with D-Tools to capture site survey, scope of work, customer interface preferences and specified materials. Tracks and updates changes in purchase orders, materials lists and labor, providing real-time per-diem costs and profitability forecasting. Subset report shows customized labor summary by department.
- **Invoice Forecasting:** Generates invoice projections for value and receivables dates, based on terms selected in the Opportunity Module and the total amount after engineering team locks in its figures. Ensures invoices go out on time. "Generate Invoice" button sends data from Opportunity/Rooms Modules to the Sugar Quotes module and generates an invoice that syncs to QuickBooks.
- **Commissions and Splits:** Reportable application for each sales person that tracks commissions based on a proprietary commissions report program. (Was a factor in encouraging Sugar adoption by sales staff.)
- **Snapshot:** Captures real-time data image of each project via an attached Excel file, with a tab for each room at various points in the pre-quoting, quoting and engineering stages.
- **Labor Capture:** Records actual time against each job, including a custom mobile entry screen that provides specific job breakdown.

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