sugarcrm

Scaling Processes and Operations with Fig Industries and SugarCRM

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Since 2000, Fig Industries, a marketing agency based in Pennsylvania, has been creating positive change for their marketing clients and communities. As a woman-owned Certified B Corporation, they work with brands and businesses that value excellence, quality, and ethics.

But could a branding, package design, and magazine publications company use CRM software not only for traditional sales and marketing functions but also to run publishing processes? The answer, it turns out, is an enthusiastic yes.

"Each magazine we publish has many assignments and deadlines: who's writing which article, who's photographing it, what advertisers will be included, and the status of all advertising and editorial copy," says Amy Hynes, Fig Industries' product manager. "That's just for starters. Add in additional deadlines, from draft copy to final approval, on every single piece, and you have a massive amount of process for each issue – and it must be perfect. There's no going back and fixing it once it's printed."

Industry ///
Marketing Agency

Location ///
Lancaster, Pennsylvania

Website ///
www.figindustries.com

Fig Industries publishes Fig®, six hyperlocal guides to shopping, dining, arts, and entertainment in Pennsylvania and South Carolina. The quarterly publishing schedule adds up to twenty-four issues each year, a large task for any organization—but Fig Industries also has a thriving business for clients who need branding, creative packaging, marketing strategy, photography, and letterpress. Even the least creative of us gets the picture that it's a lot of information to manage, and it's all time-sensitive.

Fig Industries chose SugarCRM as their partner in business to help both customize and support their advertising, sales, and magazine publishing processes, as well as their flourishing design business. Not only does it mean streamlined efficiency for their workflow, but it also creates opportunity. Without Sugar, Fig Industries was looking at the grim reality that they could not grow at the level or at the pace they needed to stay competitive in their industry.

Relieving Fig's Growing Pains Required Both the Right Technology and Partner

"Our business model is a blend of design and administrative staff, writers, and photographers. With six Fig® magazines in place and our intensive schedule, we were rapidly approaching a breaking point where we couldn't expand our business with our existing software tools," Amy relates.

Like many product managers, she found herself asking how they could do more work without increasing staff and how they could digitize their workflow without a cumbersome, sophisticated system.

"I was brought on board with the specific charge of growing the business. We want to double in the next three to five years," said Amy. "But how could Fig Industries publish Fig® for more areas with our already maxed-out workflow? We needed a system to help us keep track of everything so we could say 'yes' to more work."

Amy knew that in order to grow, Fig Industries needed something flexible and powerful, and they needed it fast.

"It was just a few years ago that I was hired to be Fig Industries' product manager. My job would entail making sure all publications go to press on time. From the beginning of selling ads for each issue to okaying a mailing date, I touch every aspect of our business. I was excited to know that I would be able to help build a custom system that fits the needs of Fig Industries' future."

Salesforce vs. SugarCRM: Choosing the Right Cloud Partner

"We wanted to start with a cloud-based system. Being on the cloud let us get up and running so much faster, and it seemed easier: no worries about installing software on our server, doing backups, or other technical concerns. It felt safer. For small businesses, especially those that often don't have staff who know lots about data and IT, there is a 'fear factor' about data safety. With the cloud, Sugar would be completely taking care of us."

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Product Manager, Fig Industries

They did consider other cloud-based solutions, including Salesforce.com. "My former company had a massive process system and was ready to integrate it with Salesforce, but I had never really been sold on Salesforce," says Amy. "For Fig Industries, Salesforce just didn't have the flexibility we wanted. Fig Industries reviewed Sugar, and we tested it with a few sales team members, and the decision was made. Right off the bat, we could all see that Sugar was user-friendly. Sugar was the right decision for us to make."

SugarCRM: The Best and Most Flexible Option for Fig Industries' Needs

"Besides the fact that Sugar is simple and out-of-the-box, it was reassuring to know that even if we decided to have it on our own server later, we could, but getting started, we didn't have to know much about development or servers or hosting," Amy affirmed.

Still, a helping hand made things easier getting started. As Fig Industries learned more about the enormous possibilities that Sugar offered, they realized they wanted to harness their ability to tightly tie together what at first seemed to be separate business processes.

Now, Fig Industries' staff uses Sugar to manage publication deadlines and forecast advertising revenue from each issue. Sugar's matrix-style reports can show all such information quickly for all six Fig® magazine's quarterly issues. But that's just the tip of the iceberg of what Fig Industries has been able to accomplish over the last couple of years.

A Moment in the Day

"Let's say I'm managing editor for one of our Fig® magazine issues. I can use Sugar in a traditional CRM sense: it has records of potential and current advertisers. We can use the lead generation modules to target ad sales. On top of that, we have small custom 'modules' that help me track ongoing design notes for a particular ad: 'the client wants all the text in red' or 'the photo needs to be the ad background instead of inset,' for example. When the ad reaches the end of the pipeline and is considered 'sold', Sugar can automatically schedule alerts for each person who will then need to work on it to create copy, photographs, where in the issue the ad is running, if it covers a seam (the fold of the magazine), and more. It all happens just by filling in certain fields.

"For instance, Jane just sold an ad. We now need to write an informational story about the advertiser to go with it. As the editor, I chose the name of the writer I wanted from a dropdown and boom, Sugar automatically sent an email to that writer containing the salesperson's name, the size of the ad, the press date, notes from the sale, and other info.

"As the magazine editor, I don't know how Sugar makes that email happen, and frankly, I don't care. What I know is that it saves me from having to type the same kind of email repeatedly for each issue. That's a huge workflow time saver. It's also a guarantee. That email gets sent, thanks to Sugar, even if I happen to be interrupted right then with a phone call."

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Top Priorities: Mobile Photo Journalism and QuickBooks Integration

Working to publish a local magazine, sales, and editorial staff are always on the move and out of the office. Every process that exists in Sugar is also available on the Sugar mobile CRM app. Users take photographs onsite and dictate meeting notes directly into their phones. Sugar's mobile CRM truly is the workhorse of this installation."

This year, Fig Industries opted to integrate Sugar with their on-premise QuickBooks installation. Sugar installed a data integrator tool with QuickBooks connectors to automatically update Sugar with the latest accounting summaries and customer invoice data.

"We would not have been as confident if not for SugarCRM. This truly great group of people helped us to see both the short-term and long-term strength Sugar could offer our company. It wasn't just a way to boost sales and keep track of customer information. It could manage our publishing workflow processes. It could become a source of information our customers could access through our website. Sugar was powerful, which would help us to be more powerful, too, while enabling us to grow," said Amy. "We're very pleased with how collaboration, creativity, and SugarCRM have allowed us to focus even more on our customers and doing things perfectly for them. Even businesses without a big IT staff like ours benefit extensively from a well-designed CRM system."

The Sweetest Sugar Integration: CRM and Email

Fig Industries, like most CRM users, knew that integrating their CRM with email would boost efficiency everywhere. Sugar was able to help them through that process.

"Our next task with Sugar was to get help on what is called "dependent fields"—when you choose a value for one field, it pops up another box tied to that value. It's just an example of the importance of a longtime partner such as Sugar, with their excellent helpdesk. They are so highly responsive. They're so fast. I never have to wait. They completely support us as we constantly fine-tune our system to make it better and better," she says.

Looking Ahead: Scaling Processes and Operations with Sugar

Fig Industries has been delighted with the development of mobile apps for Sugar in the last couple of years. "Every improvement is an improvement on an already great app," Amy reports.

In the coming years, the Fig team looks forward to getting more from Sugar. "We want custom reports, which we can design using the information stored in our on-premise system," says Amy. "We want data analytics. We're looking forward to powerful visual dashboards aimed at giving all stakeholders real-time updates."

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As Fig Industries flexes its Sugar muscles, even more opportunities open up. "We now look at Sugar as the hub in the middle of our company wheel. Sugar protects our data while it simultaneously moves critical information to our publication website, manages workflows for designers, writers, and photographers, and feeds our billing systems. Fewer mistakes happen because everything is written down and tracked. It's absolutely the best CRM software platform there is, and we have such a great team at Sugar to support it."

Fig Industries' goal by year end is to have advertising clients be able to log into the Fig Industries website and access their own dashboards. "We can give them advance billing info, tell them when their ad will go to print, what designs are ready for their review, and what their billing information is. We're excited about that. Having a customer-centered focus would give our studio a huge value-add compared to other similar studios. Our goal is to be as transparent as possible in our workflow. It lets our customers engage in a way that they truly feel part of the process."

Fig Industries can look forward to strong positive growth, and they're looking forward to using Sugar even more effectively. "Our Sugar will evolve to support many more processes. We're now using Sugar's Knowledge Base to build a library of critical company information to streamline things like new employee training," Amy relates.

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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.