

## CUSTOMER CASE STUDY

# Building Material Distributors Increases Sales Productivity with Sugar

## BMD Adopts a Customizable, Affordable CRM and Implements a Customer Portal

Building Material Distributors, Inc. (BMD) is a national building solutions company that supplies everything needed for completing construction projects— from nails and windows to insulation and roofing. As a wholesale distributor of building materials for over 75 years, BMD provides the best products the industry offers. Recognizing the need for efficiency and modernization, BMD implemented Sugar, an advanced automation solution, in order to automate manual processes, improve communication, and increase productivity.

## Building Better Operations One Process at a Time

BMD's Millwork Division, often called the "Marvin Division", is the official distributor of Marvin Windows and Doors west of the Rockies. They are the largest and most profitable division of BMD. Prior to implementing a CRM system, BMD manually processed all communication and opportunities using Excel spreadsheets and shared email boxes.



Industry ///


Construction

Location ///

Galt, CA

Website ///

[www.bmdusa.com](http://www.bmdusa.com)



The Marvin division often had long lead times on projects, which unfortunately lead to an enormous amount of tedious follow-up due to the manual nature of their current operations.

The three divisions at BMD were also operating completely autonomously. For example, a sales rep for Marvin could visit a customer and then a sales rep for the building division could visit the same customer a week later and neither rep was aware of the other's visit. BMD needed a system and process for recording client calls and visits that could be shared among the divisions.

## Changing the Game by Constructing a Single Source of Truth

To evaluate CRM solutions, BMD formed a CRM advisory team consisting of employees from various divisions to lead the initiative. Their key CRM requirements included:

- Cross-company communication of customer touches
- Project tracking and documentation
- Consolidation of account data and information accessible to all divisions

Sugar was chosen because its powerful platform met BMD's requirements. This included a customer portal that had the ability to be customized for BMD's business needs and was affordable. After the deployment, BMD hired SugarCRM to implement some of the more complicated customizations.

Jay Carter, Senior Software Engineer at BMD, was very involved in evaluating CRM options, deploying Sugar to over 75 users, "We initially worked with another Sugar partner who quoted us a huge number for the work we needed done. To stay on budget, we decided to scale back the requirements for phase one, but as we did the other partner didn't seem as interested in working with us," said Carter. "When we came to SugarCRM, they treated our little tasks like they were important. That really impressed a small company like ours."

The biggest customization was to the accounts module. BMD's primary system assigned multiple customer numbers to the same customer across different divisions. Part of the Sugar deployment was to consolidate information with a nightly refresh of the accounts module from BMD's main system. Now everyone working on the account has access to consistent information. One of the most applauded customizations was user defaults. SugarCRM created custom fields so when a sales rep logs a call, specific fields are pre-populated depending on the division. Reps no longer have to key them in. "Our largest division was manually operated for years. Now we have all sorts of workflows, records, and notifications that have taken away a lot of the tedious, manual processes. We can't imagine not having had it before," said Carter.

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**– JAY C.**  
Senior Software Engineer,  
Building Material Distributors

# The Aftermath of a Successful SugarCRM Implementation

## Improved Communication and Efficiency

By consolidating information in Sugar and automating its processes, BMD has improved transparency and communication among the sales, marketing, and customer service divisions. “Sugar has helped us a lot because there were many things in our old system that were time-consuming,” said Carter. “Now it’s easy for me to build workflows and custom fields as requested by our users.”

## Detailed Project Tracking

The ability to use Sugar to track big dollar projects with long lead times and many stakeholders has been invaluable for BMD. Sugar has allowed sales and marketing to track the life of the project in much greater detail. BMD also has a custom module that identifies companies such as architects who are influencers on projects but are not customers.

## Intelligent Reporting

Syncing reports from another company’s system into Sugar gave sales reps all the information they needed without having to toggle between the two systems. Sugar also eliminated the need to create a weekly status report in Excel because the calls module allowed sales reps to easily track customer touches and create real-time reports that updated automatically.

## Mobility

BMD users have appreciated the flexibility of accessing their CRM through our mobile app. This convenience has led to the replacement of several laptops with tablets, promoting mobility and agility. Tablets now serve as portable offices, allowing employees to stay connected on the move, fostering collaboration during meetings and site visits.

## Enthusiastic Users

Since implementing Sugar, BMD has created a team of super users who meet regularly to compile feedback. “If they’re continuously recommending additional improvements, you know you have user adoption,” commented Carter.

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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](http://www.sugarcrm.com).