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The key to success in the manufacturing industries

Real life insights

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Trends in the manufacturing industries (with relevance for CX)

These days, the manufacturing industry faces a unique set of challenges in generating exceptional customer experience (CX), caused by accelerating technological trends and increasing consumer expectations, also towards made- or even engineered-to-order (customized) products. To support these trends, a digital transformation has become a necessity to enable businesses to be nimble and adaptable. This requires a corresponding IT landscape that offers manufacturers the agility of digital systems and central, available, and reliable data. This way, manufacturers can address specific customer needs and at the same time enable intelligent product innovation and service delivery.

Another significant trend is the still ongoing mitigation of supply chain vulnerabilities via the reshoring of production and making them more flexible. By bringing manufacturing processes closer to home, manufacturers are improving supply chain resilience and enhancing their ability to deliver products more swiftly and reliably to customers. This fosters a stronger and more direct connection with their market. More flexible supply chains, or supply networks, additionally reduce the dependency from single suppliers by allowing to source pre-products more easily from different sources.

The integration of advanced technologies like artificial intelligence (AI), the Industrial Internet of Things (IIoT), and smart manufacturing solutions is redefining CX in manufacturing. These technologies facilitate real-time data analysis, increased automation, predictive – even prescriptive – maintenance, and more efficient production lines. This directly impacts product quality, delivery times – and therefore customer satisfaction – while keeping costs in check.

Furthermore, an emphasis on sustainability and green manufacturing processes reflects a growing customer and regulatory demand for environmentally responsible products. The increasing need for carbon neutrality and the use of renewable resources addresses environmental concerns and aligns with customer values, thereby enhancing brand loyalty and customer trust. In essence, the manufacturing industry focuses on digital agility, supply chain resilience, technological innovation, and sustainability to be prepared for a future in which exceptional CX is essential to competitive advantage. Manufacturers that embrace these trends by investing in CX technology and sustainability are best positioned to meet the

ever-evolving customer demands by solving concrete problems related to product customization, supply chain reliability, and environmental responsibility.

How does a modern CRM system help?

To achieve this, a modern Customer Relationship Management (CRM) system plays a pivotal role. It enables manufacturers to navigate and embrace the above core trends, thereby enhancing not only the customer and user experience. By offering centralized access to customer data and interactions, a CRM system provides comprehensive and actionable insight into customer preferences, behaviors, and feedback. This insight is instrumental for manufacturers aiming to offer customized products and services. It enables the accurate targeting and personalization of relevant offerings, a precondition of an individualized customer experience.

Moreover, in the context of reshoring and supply chain optimization, modern CRM systems offer AI-based analytics and forecasting tools that help predict demand more accurately and manage inventory as well as the supply chain more effectively and efficiently. This capability ensures that manufacturers can respond swiftly to market changes, reduce lead times, and improve delivery reliability, thereby directly contributing to a positive CX.

Integrating CRM with AI, IIoT, and smart manufacturing technologies enhances operational efficiency and customer service. Using predictive analytics, CRM systems can anticipate customer needs and maintenance requirements, facilitating proactive service and minimizing downtime. This creates a seamless, responsive customer journey, from initial inquiry through to post-sales support, by leveraging real-time data to deliver personalized experiences at scale.

In addition, CRM systems can support sustainability initiatives by enabling companies to track and analyze customer preferences for eco-friendly products, helping manufacturers align their product development and marketing strategies with customer values on sustainability.

In summary, modern CRM systems are indispensable tools for manufacturers seeking to leverage digital transformation, supply chain resilience, technological innovation, and sustainability to deliver superior customer experiences. By providing deep and actionable insights into customer needs, facilitating personalized interactions, and enhancing

operational efficiencies, CRM systems help manufacturers stay ahead in a highly competitive and rapidly evolving market.

Executive Summary

This whitepaper distills insights from a collection of case studies on SugarCRM implementations across the manufacturing industries. It answers the questions of where many manufacturing companies stand in their journey and what their CRM priorities are. It highlights the pragmatic benefits observed across various sub-verticals. Companies adopting SugarCRM have managed to consolidate customer data into a single platform, facilitating cross-departmental collaboration and enabling a more coordinated approach to customer service and engagement. This consolidation has been crucial in improving information flow and decision-making processes in these businesses.

One of the tangible outcomes of implementing SugarCRM has been the noticeable reduction in time and resources spent on routine administrative tasks, allowing companies to allocate more effort towards strategic initiatives that directly contribute to growth and customer satisfaction. This shift towards operational efficiency has not only improved user adoption and user experience, but also their productivity. This positions these companies more favorably against their competitors.

Moreover, the adoption of SugarCRM has enabled these manufacturing businesses to leverage detailed customer insights for crafting targeted marketing strategies and optimizing sales efforts, leading to enhanced market presence and better sales outcomes. The platform's robust data management and analytics capabilities have facilitated a shift towards informed, data-driven decision-making, allowing businesses to adapt quickly to market changes and customer needs.

Finally, the investment in SugarCRM has prepared these companies for future challenges and opportunities by adopting a system that supports technological advancements and evolving business models. This whitepaper presents a factual, evidence-based overview of the benefits realized from SugarCRM implementations, derived from a series of customer interviews, demonstrating its role in enhancing operational efficiency, customer engagement, and strategic agility.

How manufacturers address the trends

CS for Doors

CS Cavity Sliders is New Zealand's premier manufacturer of cavity sliding door systems – pocket doors, i.e., doors that slide inside walls. The company was founded in 1986 and has since grown into a market-leading manufacturer of innovative, high-quality door systems used around the world with branches in New Zealand, Australia, and the United States. The company is now part of the Raven Products Group.

The challenge

The biggest driver for the CRM implementation at CS for Doors was customer service. The company increasingly faced customer feedback that persons with knowledge about the customers' projects were hard to get hold of. Increasing customer dissatisfaction led to employee dissatisfaction and high turnover, with the corresponding loss of knowledge compounding the problem.

> *"I like the way Sugar Serve and Sell integrate and work well from a customer service perspective."*

Additionally, the company did not have an integrated system for managing customer data, which led to fragmented efforts across marketing, sales, and customer service. This disconnect prevented CS for Doors from effectively communicating with its customers, thus limiting its overall operational efficiency and effectiveness in addressing customer needs, adding to the frustration on all sides.

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The solution

CS for Doors chose to implement SugarCRM, aiming to centralize customer interactions and data across sales, marketing, and customer service. This move intended to enhance customer service by enabling seamless access to customer histories, improve collaboration across departments, and bolster marketing efforts with a robust customer database. SugarCRM provided the tools to streamline communication and operational efficiency, addressing the company's primary issues with customer engagement and internal processes.

> *"I saw the benefit of having a CRM that focused on what we were doing in the customer service space so that we could actually give the sales team a better understanding of what the customers were asking for."*

The implementation's first priority was providing a better service experience and giving the sales team a better understanding of what the customers were asking of the customer service team, as the majority of interactions happen with the customer service – and not the sales team.

The benefit

CS for Doors derives a number of tangible and intangible benefits from its SugarCRM implementation. In summary, it significantly improves the company's ability to serve its customers and integrate its marketing and sales efforts. Finally, it lays a foundation for future growth and adapts to evolving market needs by setting a solid foundation for flexible and automated processes.

In detail, there are 6 core areas of benefit.

Customer Service: The implementation enables a cohesive and informed customer service experience. By centralizing customer interactions and information, all team members have access to comprehensive customer histories. This reduces response times and improves service quality. It also directly addresses customer feedback about difficulties in reaching knowledgeable staff and helps reduce staff turnover by alleviating stress and enhancing job satisfaction.

Enhanced Collaboration and Visibility: The CRM system facilitates better collaboration between sales, marketing, and customer service teams by providing a unified and shared database. This integration allows a seamless flow of information across departments, improving operational efficiency and enabling the company to present a unified front to customers. Managers and team leaders have a better overview of customer interactions across different regions, thus enhancing their ability to manage and standardize processes.

Marketing Effectiveness: With the ability to capture and store customer data effectively, the marketing team saw a significant increase in the number of contacts for relevant communications. The database now allows targeted and segmented marketing. Communication and engagement strategies have become more effective, which directly impacts the company's market presence and brand awareness.

Sales Efficiency: SugarCRM provides sales teams with comprehensive visibility into customer interactions with all departments. This visibility allows sales representatives to be more proactive and efficient in their follow-ups and sales calls, as they see a complete history of communications, opened emails, and internal notes related to each customer. This comprehensive overview helps tailor their approach to meet the specific needs and interests of each customer.

Data-Driven Decision Making: The centralized system offers detailed insights into customer interactions and trends. This supports more informed decision-making. The ability to analyze and interpret data helps the company identify areas for improvement, adapt strategies in real-time, and forecast future needs more accurately.

Preparation for Future Trends and Technologies: While the initial focus was on solving immediate customer service challenges, the CRM implementation also positions the company to better adapt to future technological trends and customer expectations. This includes increased automation, enhanced self-service capabilities, and the integration between CRM and other systems like the ERP or CMS for enhanced operational efficiency.

Company in the home furnishings industry

The company was established in 1918 and is the industry leader in the to the trade home furnishings industry. The fifth-generation family business manufactures and distributes fabrics, furniture, wall coverings, trimmings, carpets, and accessories. The family's commitment to innovation has helped the company transform from a small fabric house to a

global leader, representing brands and designers from all over the world. The company owns several high-end fabric houses that specialize in style, luxury, and exceptional design. With locations in North America and worldwide, it works with a customer base of residential interior designers of various sizes.

The challenge

The company's main challenge is that the sales experience in their marketplace is highly dependent on relationship management, making it necessary to fully understand customer interactions to capitalize on all touchpoints – digital or physical – to enable personalized engagement. This engagement predominantly happens via its sales force which has basic toolsets to manage and track their customer engagements. At the same time, it was very important to demonstrate value to the sales team as a way to accelerate user adoption of a new system.

> *"SugarCRM enabled us to create a toolset for our sales team that we didn't have before and change the way we think about how our sales team engages with their customers."*

The solution

The company chose to implement SugarCRM after an RFP process because the team felt in good hands with W-Systems (now part of SugarCRM) who put together a very good demo that spoke to its needs. The pre-sales engagement and demo showed that SugarCRM is attentive to customers and had the best mix of functionality and flexibility at a reasonable level of investment.

The implementation itself focused around managing customer data and interactions between customers and the sales team. This in an environment with a deep integration into the company's Oracle ERP system. The objective was to provide data with a corresponding tool set in a way that sellers could become more productive in their customer engagements.

The benefit

Due to the good relationship with the SugarCRM team and despite ongoing change management to help some sales reps leverage the new system, the company achieved the

key benefit of improved customer interaction management. By using SugarCRM, it does more effectively track and manage interactions with customers. This leads to a better understanding of customer engagement and an increased ability to serve them.

Improved Customer Interaction Management: By using SugarCRM, the company is able to track and manage interactions with customers, including service interactions more effectively. This leads to better customer understanding and an increased ability to serve them.

> *"It was really about being able to understand the amount of time that sellers were having to engage with their customers, being able to improve that over time by creating efficiencies for them."*

Operational Efficiency: Although mostly done via custom work, the integration between SugarCRM and the Oracle ERP allows for streamlined operations and avoidance of data silos. This can result in a reduction of time spent on administrative tasks and focusing on customer service, which is predominantly done out of the Oracle ERP system.

Enhanced Personalization: The more structured collection and subsequent utilization of detailed customer data will enable the company to offer personalized experiences across both digital and in-person sales interactions in later stages. However, the company only starts to leverage the better CRM data for marketing purposes.

Data-Driven Insights: Access to comprehensive customer data supports more informed business decisions and strategy adjustments, particularly in sales and marketing efforts.

Technology Adoption for Future Growth: The CRM implementation allows the company to explore the adoption of AI and other technologies in a pragmatic way. It positions the company to leverage new predictive tools for enhancing product presentation and customer engagement, but also extending the CRM footprint into customer service and marketing, ensuring the company remains competitive in the luxury home furnishings market.

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Asbury Carbons

Asbury Carbons is one of the largest processors of graphite and carbon materials. The company was founded in 1895 and now has locations in the US, Mexico, Canada, and in the Netherlands. In a simplistic form, Asbury Carbons makes big rocks small, taking large graphite blocks, crushing them down to small pieces that serve as a pre-product for different applications, including in the automotive or steel industries, as a building block for their manufacturing.

The challenge

Asbury Carbons aimed to overcome two main business challenges. Primarily, they wanted to transition from an outdated, laptop-based CRM system to a modern, cloud-based solution. With this, the company wanted to increase its ability to concentrate on the core business of processing materials instead of dealing with systems and IT. Additionally, this addressed the necessity of centralizing customer data and improved accessibility. This was critical for supporting their sales team, which required the ability to access and update customer information from any location. Additionally, Asbury Carbons faced

> *"One of the biggest impacts you can have with any CRM is having a company realize they need it."*

challenges with data quality and organization; their existing CRM system had become a repository for unstructured and cluttered data, hindering effective data analysis and sales strategy formulation. These challenges reflected Asbury Carbons broader goal to adapt to changing market dynamics, including shifts in geographical sourcing of raw materials and the increasing importance of the battery market, which necessitated a more flexible and efficient CRM system.

The solution

Asbury Carbons chose to implement SugarCRM for its functional fit and because the implementation partner W-Systems (now part of SugarCRM) clearly understood what Asbury Carbons wanted to achieve and had a clear-cut implementation methodology. What made SugarCRM stand out in Asbury Carbons eyes was the system's ability to link different pieces of information to each other. The system was combined with a custom sampling system and a CPQ with SugarCRM partner MobileForce. Next, Asbury Carbons step plans to connect

SugarCRM with its corporate ERP and the company's lab systems to achieve a true 360-degree view of the customer.

The benefit

Asbury Carbons is still broadening and widening its SugarCRM footprint. Still, some benefits are already now clearly visible and will grow over time.

Outsourced IT Management: By moving to SugarCRM, Asbury Carbons was able to outsource IT responsibilities like security, backups, and system maintenance; this allows the company to focus more on the core business activities of processing materials.

> *"The most important thing about Sugar is linking. You can link information to everything. And that's what you really have to do."*

Centralized Customer Data: Asbury Carbons achieved a centralized repository for customer information, enabling easy access and management of data across their global operations. In further steps, this will allow sales representatives to address their customers truly informed.

Improved System Accessibility: The shift to a cloud-based CRM system facilitated remote access to customer data and other relevant information, supporting the sales team in accessing and updating information from anywhere, thereby enhancing productivity.

Increased Data Quality: The implementation allowed for the cleanup and organization of existing data. This significantly improves the quality of information available for operational work, decision-making and strategy development.

Streamlined Sales Processes: The introduction of new functionalities, such as a sampling system within SugarCRM, structured and streamlined sales processes. This makes them more efficient and data-driven while reducing the learning curve for sales representatives.

Adaptability to Market Changes: The flexibility gained by implementing SugarCRM supported Asbury Carbons need to quickly adapt to changing market dynamics, including shifts in raw material sourcing and the growing importance of the battery market. This ensures that the company remains competitive.

Starrett

The L.S. Starrett Company is a 145-year-old company out of Athol, Massachusetts. The company manufactures more than 5,000 variations of precision tools, gages, measuring instruments, and saw blades for industrial, professional and, consumer markets worldwide. Starrett operates manufacturing- and sales offices in North- and South America, Asia, and Europe.

The challenge

Starrett is somewhat different from the previous stories, as it already had an existing SugarCRM implementation. However, the company faced significant challenges with the system that was implemented without a clear strategy and an eye on the salespeople. The system was inefficient, and a lack of administrative support left the CRM disorganized and filled with unstructured and duplicated data, hindering effective sales and customer data management. This made it difficult for sales representatives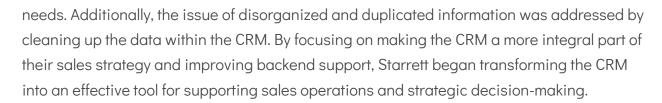 to input data. The consequences were underutilization and low engagement. With valuable data scattered and not being effectively utilized, Starrett's CRM was not serving its intended purpose of supporting sales operations and strategic decision-making. This necessitated a concerted effort to streamline operations, clarify processes, and fully integrate the sales team into the CRM's use, aiming to transform it into a tool that could actively contribute to the company's success.

> *"I think the biggest thing that is helping us is the transparency. Everybody can see everything."*

The solution

Starrett tells quite an interesting turnaround story. The company realized that it was invested in SugarCRM and, more importantly, that the problem was the implementation rather than the system. Consequently, they tackled their CRM challenges by streamlining the system and involving all relevant stakeholders in this process. They reduced unnecessary customizations, making the CRM more user-friendly, especially for sales representatives. Regular meetings were initiated to include inputs from sales, marketing, and management, fostering a collaborative approach to refine CRM usage. This team approach helped in setting up clear processes and ensuring that the CRM was aligned with the sales team's

needs. Additionally, the issue of disorganized and duplicated information was addressed by cleaning up the data within the CRM. By focusing on making the CRM a more integral part of their sales strategy and improving backend support, Starrett began transforming the CRM into an effective tool for supporting sales operations and strategic decision-making.

The benefit

By investing in the renewal of their existing SugarCRM infrastructure, Starrett gained a number of benefits that the company might not have got from implementing a new system, and probably also at lower cost. These benefits include:

Improved Sales Process: The cleanup and reorganization of the CRM in a collaborative way that included all stakeholders allowed for a clearer sales process. This makes it easier for the sales teams to track leads, manage opportunities, and follow up effectively.

> *"It was a huge thing for the guys to have the visibility and a way to track things, and for management to see what is moving."*

Streamlined Data Management: Starrett achieved a more organized CRM system with cleaner, deduplicated data, enabling more efficient access and use of customer and sales information.

Increased Collaboration: Regular meetings and discussions among sales, marketing, and management fostered a collaborative environment, ensuring the CRM met the needs of all stakeholders. This also increased the trust and transparency between departments.

Enhanced User Engagement: By simplifying the CRM interface and reducing unnecessary customizations, sales representatives found the system more user-friendly, leading to increased usage and engagement, which leads to more sales.

Better Decision Making: With cleaner data and improved reporting capabilities, management as well as sales team members gained better insights into sales activities, supporting more informed strategic and operational decisions.

Greater System Flexibility: Streamlining and reducing customizations in the CRM provided Starrett with a more adaptable tool that is more capable of evolving with the company's changing needs.

Company in the Maintenance, Repair and Operations sector

The next company was established in 1952 and is a distributor of consumable MRO and automotive repair products throughout North America, specifically the U.S. and Canada. It sells primarily via a direct sales force of about 800 representatives and managers who add value to their customers' operations by providing a service called vendor-managed inventory. That means that for the consumable products it sells, it also provides customers with storage solutions, labeling, and organizational strategies so they can better manage their spend in the consumable MRO space.

The challenge

The company sought to overcome the absence of an effective Customer Relationship Management (CRM) system, having previously relied on inadequate tools for managing customer interactions and data. The company's previous attempt with an SAP CRM system never gained traction among the sales force, leading to its abandonment in favor of basic, less sophisticated methods like smart sheets for customer management. This lack of a robust CRM infrastructure resulted in significant gaps in the company's ability to be customer-centric and hindered its sales processes. Without a CRM, it faced challenges in gathering pre-transactional insights, understanding customer behaviors, and effectively managing customer data for targeted marketing campaigns. The move towards implementing SugarCRM was driven by the necessity for a more intuitive, comprehensive system that could capture the full spectrum of customer interactions and data, providing a 360-degree view of each customer to support more strategic, informed sales and marketing efforts.

> *"When I think about CRM, I think about a tool that needs to evolve to incorporate insights from all these different channels and platforms."*

The solution

The company selected SugarCRM for two reasons. First, its straightforward user interface is designed to simplify sales representatives' tasks. Second, SugarCRM's pricing model includes all features in a single license, eliminating additional costs for extra functionalities. This aspect was crucial for budget management. The CRM's ability to be customized without extensive IT involvement was another key factor, allowing the company to tailor the system to their specific requirements efficiently. The decision was also influenced by SugarCRM's seamless integration with the MobileForce Configure, Price, Quote (CPQ) system, which MobileForce could showcase in a few days. The selection process itself involved a team of end users, including sales staff, who unanimously favored SugarCRM for its potential to streamline operations and improve customer relationship management.

The benefit

The implementation is fairly fresh and not yet fully rolled out. However, due to the deep involvement of the sales teams in the selection process, some benefits are visible already now.

Comprehensive Customer Insights: The implementation of SugarCRM enables a 360-degree view of customers by blending transactional data from ERP systems with behavioral, firmographic, and relational insights. This comprehensive view allows for a deeper understanding of customer needs and behaviors, supporting more strategic sales and marketing efforts.

> *"The information that is now available at the reps' fingertips are really making an impact to the day to day."*

Increased Sales Process Efficiency: With SugarCRM, sales representatives gain an organizational tool that streamlined their day-to-day activities. The ability to access customer information, schedule meetings, and track follow-ups in one platform significantly improved sales efficiency, especially for those operating remotely or on the go.

Improved Data Quality and Management: The CRM facilitated the cleanup of customer master data, addressing issues of duplicates and inaccuracies. This not only improved the integrity of customer data but also supports more targeted and effective marketing campaigns.

Increased Adoption and User Satisfaction: SugarCRM's intuitive interface and configurability encourage adoption among the sales team. Its user-friendly design, tailored to salespersons' needs, leads to increased usage and satisfaction, as it reduces the friction in the sales processes.

Strategic Marketing Capabilities: By housing detailed customer insights, the CRM will empower the marketing team to execute more targeted and nuanced campaigns. This ability to segment customers based on comprehensive data profiles enabled more personalized and effective marketing strategies.

Operational Visibility and Collaboration: The CRM system provides a central repository for all customer-related activities and data, enhancing visibility across the organization. This facilitates better collaboration between sales, marketing, customer service, and management, leading to a unified approach to customer engagement and problem-solving.

Conclusion

There are some main outcomes that are visible throughout these customer testimonials. All of them are a result of SugarCRM being built on the idea that customer-facing operations need to be run from one single system that relies on a consistent set of data. This is augmented by the system's easy and powerful configuration capabilities.

Firstly, there is a significant improvement in data management and consequently, customer insights. This is because the CRM system acts as a central repository for customer information, transactional and behavioral, enabling the different businesses to keep data cleaner. This, in turn, facilitates a 360-degree view of the customer that supports more effective and strategic sales efforts.

Day-to-day business for the sales reps became more efficient due to comprehensive visibility and thought-through processes. In combination with the improved data quality, more data-driven sales and operational activities were enabled, which reduced the time spent on administrative tasks while freeing time to do the actual sales job.

In combination with a user-friendly design the results are increased user engagement as well as better collaboration inside the sales team but also between sales, service, and marketing, which increases user satisfaction as well as process effectiveness and efficiency.

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With broadening the implementation footprint, advantages go beyond the sales organization to include marketing capabilities. The more detailed data that is collected enables segmentation with a higher degree of personalization, helping execute more targeted and effective campaigns. The resulting improved customer engagement leads to improved market presence and brand awareness, which in turn helps sales.

All this together lays the foundation for growth through the enabling new technologies. As the system can be configured instead of only be customized via coding, it is far easier to adapt it to changing business and process needs.

About SugarCRM

SugarCRM is a CRM software that helps marketing, sales, and service teams reach peak efficiency through better automation, data, and intelligence to 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.

When customers have a seamless journey across sales, marketing, service, and every other critical workflow, they enjoy a high-definition customer experience (HD-CX)—one that shapes their sentiment with your company on a fundamental and personal level. With the right CRM at your fingertips, you can evaluate all customer journey touchpoints, determine how to optimize their experience, and create a consistent cadence of sales, marketing and service activity.

Author Bio

Thomas is an executive, entrepreneur, analyst, and consultant with more than 25 years of leadership experience in the software industry, business, and in IT consulting. Being an experienced CRM and CX practitioner with a unique combination of development-, quality management, and consulting skills, who effectively translates business needs into technology solutions, he brings strong value to organizations.

His achievements over the years include, but are not limited to, building the CIBER ANZ CRM consulting practice from scratch, and making it a profitable division from year one, leading the development of the Epikonic solution, a mobile-social engagement platform, as a bootstrapped SaaS start-up. He serves as an advisor of various startups.

Thomas reorganized and drove strategic development of SAP's Montreal-based CRM development center, built a test competence center in India, shaped QM departments as well as his own boutique consulting companies.

His goal-oriented outlook allows him to initiate, design, and implement transformational change and deliver mission-critical systems and complex enterprise-scale projects in time and on budget. He is an innate strategist with an intuitive ability to precisely interpret technical information, construct reports for various stakeholders and drive discussions with top management requiring a deep understanding of business drivers.

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