



## CUSTOMER CASE STUDY

# How One Leading Business and Community Bank Was Able to Boost Customer Experience and Organizational Efficiency with SugarCRM



## Sugar Powers Expert Lead Management System (EMLS) for Bank of Marin

Since opening its doors in 1989, Bank of Marin and their employees have been working tirelessly to build a thriving business and community in Northern California. Their philosophy has always been centered around building strong, long-term customer relationships that are based on trust, integrity, and expertise, inspiring loyalty through exceptional service.

But like any business, they experienced growing pains and needed a tool that would not only securely store all of their current customers but also help with the prospecting process. Bank of Marin and SugarCRM created a robust system for relationship management and sales accountability using Sugar as the development platform. The CRM has eliminated information silos, delivered comprehensive visibility into customer relationships, improved communication between customer relationship stakeholders, and made prospecting more efficient.

**Industry** ///

Banking & Finance

**Location** ///

Novato, California,  
United States

**Website** ///

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

## From Long Sales Cycles to Accelerated Growth

Banking often involves long sales cycles. So, as a premium provider of financial services to Northern Californian businesses, Bank of Marin needed a system to manage opportunities and leads through the sales process and capture information associated with those efforts. "I've always seen the need for the ability to record what we're doing with a customer, prospect or referral source," notes Peter Pelham, Executive Vice President for Bank of Marin. "With my own client base, I could use a standalone system. But when I got into administration, I realized we needed something that everyone could share."

The bank tried unsuccessfully to use an extension of its core processing platform (FIS), but it lacked a calendar function and note-taking capability. Plus, it could not provide a unified view of customers with multiple accounts. Instead, Pelham turned to SugarCRM. In response to client demand, SugarCRM was developing a lead management and sales tracking system for banks based on the Sugar platform.

## Breaking Down Silos with Sugar Enterprise

Due to its flexibility and cost-effectiveness, Bank of Marin selected Sugar Enterprise.

"The SugarCRM team was very responsive to us and helped us distill what we wanted," Pelham says. "As the system was implemented, its flexibility allowed us to move ahead faster. SugarCRM's extensive knowledge of the banking industry hastened the development time and brought industry best practices to the process. We didn't have to reinvent the wheel."

Sugar as their CRM also provided the functionality Bank of Marin required, coupled with ease of use. "Your least technical employee needs to be able to use it, so we wanted something that was easy and intuitive," Pelham says. Bank of Marin CEO Russ Colombo set the tone in terms of user adoption. Pelham went on to say, "Russ Colombo basically said, 'If we're going to put this in, everyone's going to use it.' But on the flip side, the deployment team made a very serious effort to make the system as friendly and easy to use as possible."

In fact, the system is so friendly that a training session can support a mixed group of experienced salespeople with relatively new bankers, and after only two hours, everyone can use the system. "That's a huge benefit," points out Barbara Dalmau, Bank of Marin's Senior Vice President. "You don't have to segregate people who are not as computer savvy and give them separate training. It's so easy to get started, which is beneficial to us."


In addition, Sugar delivers the ability to seamlessly manage long-term relationships regardless of staff changes. "I've banked some people for 15 or 20 years," continues Pelham. "When employees leave, you

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want to have a record of their interactions with customers, what was said, and what was promised. With Sugar, we can always provide a consistent customer experience.”

## The Results: Improved Visibility, Accountability, and Process Efficiency

The CRM powered by Sugar has increased accountability within the sales team and improved communication between the various departments that touch customer relationships. The solution has also delivered greater visibility for relationship planning. Relationship managers are aware of key customer events, such as when a company needs equipment financing or is buying a building. Similarly, Sugar made prospecting more efficient. “Now we’re not duplicating effort,” says Pelham. “I can find out if somebody else has been calling on a company.” In addition, Bank of Marin likes the Sugar campaign management feature, which enables targeted customer outreach and close tracking of results. It also places knowledge transfer high on the list of suggested improvements conveyed by Sugar. Once information is in the CRM, the bank controls it and can make it accessible to everyone. “The CRM is very customized to banking and to our account types. It has increased accountability of our sales process,” elaborates Pelham, “We also drive commission and credit for sales through our CRM. So, it gets buy-in from everybody. And we’ve integrated Sugar with Outlook. So we can create a call in the CRM, and it shows up in the Outlook calendar of everyone invited.”

Bank of Marin plans to continue developing its solution with SugarCRM. “We have a whole new package of features that we want to put into the system,” concludes Pelham. “That’s a very attractive part of ELMS powered by Sugar, the ability to make enhancements or changes.”

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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).