

## CUSTOMER CASE STUDY

# Omega Diagnostics Streamlines Sales and Marketing Processes to Enhance Customer Experience and Sales Forecasting



### About Omega Diagnostics

Omega Diagnostics is an international diagnostics testing business, passionate about improving lives by accurately informing health decisions. A subsidiary of Cambridge Nutritional Sciences Plc, the company runs over 150 labs in 75 countries. Focused on food sensitivity testing, Omega Diagnostics enables healthcare professionals and their patients to accurately identify lifestyle changes that can significantly improve long-term health and wellbeing.

### Industry ///

Healthcare

### Location ///

Cambridgeshire, UK

### Website ///

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

## Putting data at the heart of decisions

The vital nature of the work carried out by Omega Diagnostics calls for an equally streamlined and high-quality customer experience. With clients including labs, healthcare practitioners and individuals looking to understand food sensitivities, gut health and other wellness issues, building robust relationships and providing the right support based on accurate data is crucial.

However, fragmented and disparate management systems meant that customer and sales information was often siloed across different teams and spreadsheets. Along with manual and duplicate data entry, this created process inefficiencies and inaccuracies, making it difficult to deliver the quality customer experience expected.

“As our business continued to grow, it was becoming clear that the current way of managing customer communications and sales interactions was no longer fit for purpose. Manual follow-ups and separate spreadsheets were making processes cumbersome and hugely labour-intensive. Our sales pipeline management also lacked cohesion without a centralised system to track leads through the different sales stages. Visibility and access to specific sales and customer data were also an issue when it came to reporting and forecasting,” explains David C, Marketing Manager at Omega Diagnostics.

## Improving integration to enhance interaction

The lack of visibility and integration between sales, customer service, and marketing functions, combined with manual processes affecting productivity prompted a change of approach. Omega Diagnostics took the decision to look for a technology solution that would help it better record, segment and personalise interactions while also boosting overall user efficiency.


“We needed a solution that would not only centralise and streamline data capture but help us personalise communications and enable more informed forecasting. As a business we undergo regular audits, so it was important that any new system would mitigate risk by ensuring transparency, and that all information held was accurate, easy to find and interrogate,” adds David C.

## Introducing SugarCRM

To provide the level of functionality and flexibility needed, Omega Diagnostics started looking for a CRM solution that ticked all the boxes. After evaluating several vendors, SugarCRM stood out for its adaptability and ability to meet Omega’s needs now and in the future.

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Marketing Manager at Omega Diagnostics



“The offer from SugarCRM struck the ideal balance between functionality and customisation. The platform provides the scalability needed to support our growing customer base and integrates with our existing systems, which was critical for digital alignment. The reporting and dashboard functionality was extremely important to give full visibility of data on which to base future decision making and planning,” explains David C.

Omega Diagnostics is using Sugar Sell to manage customer data and sales opportunities. Sugar Automate has removed the manual nature of key customer facing business processes so the team can focus on supporting clients and building relationships by reducing the amount of labour-intensive tasks.

Customer interactions including orders, complaints and technical queries are all managed within the SugarCRM platform, making it easy to see where a customer is in a sales cycle or how their query is being handled, rather than looking in disparate repositories. Resourcing and forward planning is now much easier to predict. For example, once a sale is logged, the product support team can see when an installation is likely to take place and plan accordingly.

## Measuring value and managing risk

The system also makes it easier to track and understand the ROI of interactions. “Using SugarCRM, we can see at a glance how effective a particular campaign has been or the value of attending an event, as we can track the origin and journey of leads in one place. We can tailor messages through the system based on each interaction, to help nurture potential customers through the sales process according to their needs,” explains David C.

From a compliance and regulation perspective, SugarCRM provides greater visibility of data through easy to configure reporting and dashboards. These show clear audit trails and if the team is hitting targets and monthly KPIs. Users can check whether SLAs are being met and if client queries are being handled within the specified time and in the right way.

The sales and marketing teams are now empowered to plan and resource more effectively based on accurate insights and easy access to a wealth of up-to-date information about customers and prospects. Data on where sales are won and lost, what products are dormant and where new opportunities exist is all available thanks to the holistic and centralised view provided by the SugarCRM platform.

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## The right support for success

“Right from the start, the team at SugarCRM has been hugely supportive, patient and responsive whenever we have needed guidance. One of the big challenges we faced during the adoption phase was internal resource limitations and changes to scope. SugarCRM was great at adapting to our specific needs and helping us manage challenges as they arose,” comments David C.

Omega Diagnostics also took advantage of key resources to support user adoption and ensure the team of 20 initial users were comfortable with the functionality and value that could be gained from the system. The SugarClub community forum provided a way for the team to interact with other users of the system and receive additional support based on others’ experiences.

Extensive educational material, including videos, coupled with ongoing training sessions also provided further guidance on how to get the most out of the platform, so Omega Diagnostics could continue to realise positive gains.

“As a result of using SugarCRM we have been able to reduce manual data entry and simplify our customer segmentation process. This has allowed us to focus more on creative marketing initiatives, closing new sales and fulfilling orders. Processes are now more streamlined, and our pipeline management is more efficient,” concludes David C.

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## About SugarCRM

SugarCRM offers software solutions 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).