



#### CUSTOMER CASE STUDY

# Chasing the Right Opportunities: Industrial Manufacturer Woodward Gains Visibility and Speed with SugarCRM



In 1870, Amos Woodward invented and patented a better, faster, more efficient water wheel governor, giving birth to Woodward. Over the years, they diversified into hydro governors, expanded into industrial solutions like diesel engines, ventured into aerospace support, and have since grown to encompass a broad range of areas. Today, the company innovates components that form the backbone of aerospace and industrial technologies.

With 42 offices and 8800 employees across 13 countries, Woodward serves customers like Boeing, Airbus, and Caterpillar. "Our purpose is to design and deliver energy control solutions that our partners count on to power a clean future," says John Johnston, IT Business Systems Manager at Woodward. "We're on a journey to transition the world to cleaner energy. Our controls for renewables and innovative aircraft technologies aim to power a future where sustainability takes flight – I'm personally excited about the prospect of flying on a hydrogen-powered aircraft one day!"

**Industry** ///

Manufacturing

**Location** ///

North America

**Website** ///

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

**Products** ///

Sell

## Supporting Customers for Life

Woodward's long-lasting components are still in use 90 years later, underscoring the company's need to cultivate customers for life. "If you're going to sign such a long-term program, you are committing to the customers that you're going to support their products for as long as they need," notes John.

But maintaining such durable, supportive relationships is a challenging feat. It requires top-notch processes, tools, and visibility. Previously, Woodward relied on Salesforce as its CRM solution. "It was pricey, so we tried not to deploy it to a large number of employees," shares John. This meant those with licenses had to do a lot of extra work: extract and share data with colleagues and insert it back into the system. Those who didn't have access to Salesforce ended up keeping data on their own spreadsheets or other tools. This led to data fragmentation and productivity challenges like delayed follow-ups and difficulty in making informed decisions crucial to client relationships.

## Choosing the Most User-Friendly Solution

Woodward started looking for an alternative solution to help its team accomplish its key goal—nurturing the most strategic accounts and opportunities—without worrying about cost or scalability. It assessed different tools on robustness, ease of use, and complexity. Finally, Woodward chose SugarCRM's cloud solution, [Sugar Sell](#), as the best solution that fit their needs and would set them up for success.

Early in Woodward's implementation of Sugar, they relied on key employees who advocated for the solution. "These individuals understood what they can get out of maintaining information in a tool like Sugar versus Excel and SharePoint and Outlook," begins John. "I would have those business members discuss the process with the rest of the team and ensure the tool works for them." The prospect of a solution that would empower them rather than hinder them was promising, and soon, everyone from sales agents to leadership was rallying behind Sugar.

## Tailoring the Product

Woodward started exploring everything that Sugar had to offer. "We have a solid partnership with Sugar. They help us see what's already possible and what can be built for our specific needs," John shares.

The adaptable nature of Sugar aided the Woodward team in capturing in-person customer visit details: what transpired and who was involved. "Having this information easily accessible was of great value to leadership," John explains. "They didn't have to follow up with an email asking for trip outcomes. They knew the trip report information would be in the system, and they could go there at any time, at their leisure."

The Woodward team configured new fields to help predict the potential revenue for each opportunity over the next 10 years. The feature helped Woodward carefully evaluate and prioritize opportunities that would have benefited from more time and effort. "The idea is, the more data we gather and compare, the smarter decisions we can make as a company," says John.

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## A Bird's-Eye View

The added visibility with Sugar became Woodward's biggest win. Instead of static data and PowerPoint presentations, the company deals with a dynamic data system. "Before, it was hard for us to get a feel for our data and know if we were chasing after the right opportunities," says John. "You don't want to dwell on these things for months. Now, with good, updated data, it can be pretty clear which opportunities bring the biggest return on investment. We can make decisions faster."

By keeping a close watch, Woodward can also anticipate customer needs earlier. "Our customers need us to be ready to supply their required components. So, once we spot an opportunity, we can reach out and offer to participate in their program," explains John. Once the intent to participate gets logged, the information is cascaded across the organization via Sugar. Woodward's operations teams monitor opportunities alongside the sales teams, ensuring the company can deliver whatever was proposed. As a result, contracts get executed faster, and returns come in sooner.

## A Greener, More Efficient Future

Sugar turned out to be everything John hoped for. "It was easy to get people to use the solution without technical training, and it gave us everything we needed to support our business," he says. "It eliminated the double work of working in one tool and updating data in another. Most importantly, businesses need to get better at managing customers and opportunities if they want to grow over the years, and Sugar provides the specific capabilities we need to make that happen."

Not only did the solution provide a more affordable offering they could scale with, but it centralized data and operations in a singular home. From monitoring opportunities and accounts to generating reports, the Woodward team now has everything they need to truly deliver on their commitment to longevity and a greener future. "Our executives can preview opportunities at a glance and start discussions with relevant teams. Generating reports and getting the right information is super easy for them," John adds. Their sales team is saving time and increasing productivity, no longer reliant on a few singular teammates with access to the CRM.

With real-time, holistic visibility, Woodward now moves faster and smarter, making it possible for its team to provide efficient, lifelong customer support and fulfill its vision of a greener world. "From an engineering standpoint, I think we're barely scratching the surface of what we, as humans, can design and develop," John concludes. "And thanks to Sugar, we can record events and opportunities and provide the most benefit to the world as quickly as possible. I look forward to continuing to grow with Sugar."

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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).