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Taking Open Source to the Limit: Geeks On The Way Case Study

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Edited by Stacy Straczynski

The Company: Geeks On The Way provides computer services and technical support to customers across western Canada, and it was named as one of the fastest growing companies in Canada by *Profit* magazine.

The Challenge: Geeks On The Way handles hundreds of client calls per day. So, when the company looked to meet its growing demand for its services with a CRM system, not just any system would do. With such strong technology expertise, the company knew it wanted a system that it could customize to fit its unique business process as well as grow with the system.

Additionally, the CRM system would need to fully automate its existing business process from end-to-end.

"We had already outgrown two previous customer management systems," says Geeks On The Way CEO John Leishman. "So, we needed a flexible system that could grow with our business and really scale."

The Solution: Geeks On The Way was attracted to SugarCRM for various reasons. Since the company had already built out a telephony system on top of an open source phone system, called Asterisk, Geeks On The Way figured that it should look toward open source CRM for its client management needs. "SugarCRM simply had the largest following, the most downloads and provided the most security from a longevity of product development standpoint," Leishman notes, adding that his company felt that the standards-based design and open architecture of SugarCRM would complement the Asterisk implementation well.

The first task for Geeks On The Way after deploying SugarCRM was to integrate it with its Asterisk system, the popular open source telephony package.

Geeks On The Way also integrated Sugar with some back end databases to create efficiencies inside its service delivery model and customized the Meetings module to integrate a system that analyzes the service calls slated for the day.

The Results: SugarCRM allowed Geeks On The Way to perform deep integrations at the data and application level, according to Leishman. With the integrated system, callers are recognized by their phone number or other identifiers. If a new client is calling, a "new contact screen" pops up to the agent and a tight integration with an external database of address and postal information populates most of the new contact record. This allows agents to process existing customers quickly, and also spend less time adding new customers in to the system. And since customers are well tracked using unique identification numbers, there is less duplication of customer records.

A deep integration to the accounting system also provided strong returns for Geeks On The Way. Since so much activity and data is tracked and captured in Sugar, Geeks On The Way can simply run that data into its accounting system and more efficiently compensate its employees, which range from phone agents to contractors to field technicians. "Accounting used to take us a full 24 hours every pay period," Leishman notes, "But now it takes five minutes with our Sugar integration to our accounting system."

Since it deployed Sugar, the company says it has seen lower marketing costs and improved customer support times. "With SugarCRM, we have reduced call handling times from two to three minutes down to as little as 20 seconds," says Leishman. And the company says simply knowing who an agent is talking to through its integrated system fosters closer relationships with customers and increases satisfaction levels.

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