



CUSTOMER CASE STUDY

Jochen Schweizer Corporate Solutions GmbH Creates Outstanding Customer Experiences at Every Touchpoint With SugarCRM

When your company's entire mission is built around team building and exceptional experiences, communication is key. So for Jochen Schweizer Corporate Solutions GmbH (JSCS), finding the right customer experience (CX) platform wasn't just a nice-to-have. It was essential for success. As a market leader specializing in unique activities and corporate events, the business is known for its impressive array of 2,500+ different options for every taste and age. If a customer can dream it, JSCS is likely to offer it. Corporate customers turn to the organization for all kinds of experiences and retreats: flying and falling, food and drink, outdoor adventures and sports, health and wellness and culture and lifestyle are all part of the mix.

Of course, it's not just the events and outings themselves that make time spent with JSCS so memorable. The company needs to ensure events and activities are remarkably easy to book, too. To ensure they'll want to come back again and again, it's critical that the entire experience—from first interaction to post-event communications—is extraordinary.

IN SEARCH OF A BETTER USER EXPERIENCE...

A top priority for JSCS has always been to maintain relationships with existing customers while winning new ones. As a result, its marketing and sales teams rely heavily on customer relationship management (CRM) technology. But unfortunately, the company hasn't always been able to depend on its software to gain much-needed insights. Although JSCS had a system in place, it wasn't user friendly and didn't provide the visibility needed to support customers as efficiently as possible. Some employees weren't getting the information they needed; others were overwhelmed by too much data.

**JOCHEN
SCHWEIZER**
CORPORATE SOLUTIONS

INDUSTRY:

Events Services

LOCATION:

München, Germany

WEBSITE:

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It was definitely time to implement a new system. But first, a key group of decision makers came together to discuss the core capabilities that would be needed to ensure a better user experience.

“We sat together in a team where everyone brought up their experiences with different vendors,” says CEO Fabian Wilmes. “Following that we specifically requested three different and well-known CRM vendors.”

After narrowing down their choices, the team evaluated each one based on three important needs: robust support, high value and, perhaps most importantly, ease of use for nontechnical users.

“We really wanted to have independence from programmers, especially for smaller tasks like setting up new fields,” explains Commercial Manager Thomas Edlmann.

...TO PROVIDE EXCEPTIONAL CUSTOMER EXPERIENCES

Sugar met all of the company’s criteria—and then some.

“In contrast to competing services, Sugar made us feel valued right from the beginning, even as a medium-sized customer,” Wilmes says. “Additionally, they had all the functions we needed for our business model and offered the right cost-benefit ratio.”

After moving customer data to the new CX platform, the next step was to configure Sugar to meet the business’s specific needs.

“One of the greatest advantages of Sugar is the ability to configure,” says Manuel Kanka of Fellow Consulting, which assisted in JSCS’s Sugar deployment. “All you need is a vision of what goals you want to reach, and you can adapt the platform to meet your needs.”

Today, the sales, distribution and marketing teams can all depend on Sugar to easily engage with new leads as prospects fill out forms on the website. Better yet, they’re also able to nurture existing customers and encourage repeat business. Because customer information is up-to-date and readily available in Sugar, staff can easily determine when it’s time to reach out to past customers and share information on new offers and activities. And with custom reports, teams have full visibility into how customers are engaging with various departments across the company. This, in turn, helps ensure important opportunities aren’t missed or forgotten.

“They really love how easy and flexible the system is,” says Kanka. “The company loves that deep, in-house technical knowledge is not required to administer the system and build workflows. This is something they never had before Sugar, and it saves them a lot of time.”



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FABIAN WILMES,
CEO, Jochen Schweizer Corporate Solutions GmbH

MORE ACCURATE DATA FOR BETTER RELATIONSHIPS

The quality of JSCS's customer data has improved exponentially. The reason is simple: When a CX platform is easy to use, employees are more likely to lean on it. And the more time users spend in Sugar's intelligent customer experience platform, the smarter the system gets at providing the exact insights needed to anticipate and fulfill customer needs. This has allowed Marketing and Sales to get highly targeted when engaging with customers.

"[Staff] is willing to work with the system continuously," Edlmann says. "That's why our data quality is improving, and why we're able to ensure additional sales in the long term."

So... what's next for Jochen Schweizer Corporate Solutions GmbH?

Now that the company has transitioned from a previous CRM filled with "inadequate data" to deeper insights within Sugar, the next step is even more personalization and automation.

"Our goal is to send specific customer mailings, and to simplify standard processes with workflows," says Wilmes, who also has advice for other companies looking to make a similar transition:

"It's important to know first which functions are essential for your business model, and which are just nice to have. Once you have this list, then ask different providers for their practicability."



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MANUEL KANKA,
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Fellow Consulting AG is headquartered in Poing near Munich and operates worldwide as solutions provider for CRM consulting and implementation services.

