



## CUSTOMER CASE STUDY

# ACTenviro Takes on Big Growth Goals With Sugar

Do terms like “reactive chemical stabilization” and “emergency spill response” get you excited? If not, that just means you haven’t had a chance to meet the team at ACTenviro. This employee-owned company has been handling environmental and hazardous waste in the Western US since 2000, and has managed to make some rather remarkable impacts in its quest to protect the environment.

The “ACT” stands for “Advanced Chemical Transport.” Enviro stands for... well, you get the idea. As one of the nation’s top 100 recyclers, ACTenviro services 2,500 clients ranging from small businesses to government agencies to multinational Fortune 100 firms. It’s made the annual Inc. 500 list of fastest-growing companies ten consecutive times, and is on the Silicon Valley Business Journal’s Fast Private list — right alongside some of the nation’s most progressive, venture-backed tech startups.

After growing steadily for nearly two decades, ACTenviro has big visions for future expansion. But first, the company needed to find a solution capable of transforming customer data into insight and action.

### “WE WERE DOING THE BEST WE COULD WITH WHAT WE HAD”

The ACTenviro sales team has had access to CRM for many years, but the system was rarely used. While the company was eager to leverage its customer data for future growth initiatives, it didn’t have the right resources or technology in place.

“If our previous, non-SugarCRM instance was ever widely adopted by our reps or robust enough to be used for business intelligence, that was long before I got here,” says Director of Marketing Jeff Pickett, who joined the company in 2015 as its first dedicated marketing hire. “The system had slipped into disuse by the time I arrived. At that point, we were just doing the best we could with what we had.”

Then came a lightbulb moment.

What if ACTenviro looked for a new system? Was it possible to find another solution employees would actually want to use?

When these questions were posed by the company’s founder and president, Pickett jumped at the chance to research alternatives. After looking at several options from providers big and small, he came across one potential partner who made the decision easy. The CRM implementation firm was incredibly helpful and insightful, and had one particularly strong customer experience (CX) platform to recommend.

And so began a new journey with [Arcsona and SugarCRM](#).



#### INDUSTRY:

Environmental and Hazardous  
Waste Management

#### LOCATION:

San Jose, California

#### WEBSITE:

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

## “UNTIL WE DISCOVERED WE COULD DO BETTER”

If there was one lesson ACTenviro had learned from its first attempt with CRM, it was this: No matter what platform you deploy, performance will inevitably rely almost 100% on the people who use it. If employees don't like a system and choose not to use it, no amount of analysis and reporting will be able to extract the data and insights needed to move the business forward.

As eager as Pickett and his team were to start choosing and tracking metrics, they understood that user adoption would be the first and most crucial step.

“Arcsona was very candid,” he says. “They reminded us that the system is about the people, and that you have to start with reasonable expectations for what they can input into the system.”

Thankfully, this is one area where Sugar shines.

At a basic, day-to-day level, the graphically appealing software made it easy for sales reps to use.

“It wasn't overly complex, and that really helped us to hit the ground running and get much better adoption than we had with our previous platform,” Pickett says.

That usability then trickled down to other, bigger benefits.

“We crawled before we walked and didn't get ahead of ourselves,” Pickett explained. “It's been successful enough that we've taken on a lot of data initiatives we couldn't have otherwise. We never would've gotten to the point we are at now if the people on the frontlines of sales were afraid of the system or unnecessarily confused by it.”

With customer accounts more accurate and up-to-date than ever, it was time to move on to integrations and configurations.

“The difference these make has been tremendous,” Pickett says.

Sugar is being tightly integrated with ACTenviro's ERP and other software, quickly making it central to the flow of all information and data. This, in turn, is opening all kinds of doors to not only improving the customer experience, but making the business more effective and efficient.

For instance, integrating Sugar with an e-signature solution will significantly shorten the time it takes to get sales quotes completed, reviewed and approved by prospective clients.

“Anything that reduces the time it takes to 'get to yes' is a boon to our sales efforts,” says Pickett.

“If we send a sales quote to an agricultural specialist while she's working in the field, the customer can sign it right then and there using whatever mobile device is on hand,” Pickett explains. “There's no need to wait and go back to it later — which, in the past, would cause customers to stretch out a decision much longer than is necessary.”

This is just one example among many that have created what Pickett refers to as a “virtuous circle.” Contracts are accurate, names are spelled correctly and customers aren't getting frustrated by documents that appear with erroneous details. This, in turn, gives account managers and sales reps a reason to rely on the system: When they see what can be achieved with clean and up-to-date data, it just adds to the excitement.



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**Jeff Pickett**

ACTenviro // Director of Marketing



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## MOVING FORWARD WITH DATA

As ACTenviro continues to build on its initial Sugar success, many more applications are on the way. Moving forward, Sugar will be used to:

**Fuel future growth.** With Sugar serving as the central repository of business intelligence and knowledge, the team can better determine which types of service lines will be the best fit for the business.

"We'll get a much better understanding of which sectors we should be pushing into more aggressively, or perhaps pull back from," Pickett says.

**Identify emerging trends.** For example, if a steady or long-term customer suddenly starts to trend downward, sales reps will have a flashing red light that it's time to do some outreach.

**Increase efficiency.** Many of the activities that used to span days can now be completed in a matter of seconds with Sugar. Instead of devoting hours to analysis and conversation, sales managers will be able to lean on their account managers' quarterly or monthly forecasts.

"We can then tie these back to the ERP and see how forecasted estimates are trending with incoming receipts, which helps with budgeting and makes it much easier to identify when someone might be overstating — or understating," Pickett says. "In the past, a supervisor would have to pick up the phone or, in some cases, get on a plane."

The biggest change Pickett's seen since switching to Sugar?

"Our team now understands the value of data," he says. "We're salivating at the possibility of all the other things we can add on."

SugarCRM helps businesses everywhere provide the most outstanding experiences of all time — for every customer, from anywhere. We're building a world where companies can act as fully functional extensions of their customers. Where teams can anticipate needs long before customers even realize they have them. Where sales, marketing and services are fully freed to focus on people instead of processes. We bring innovation, transparency, integrity, value and passion to all we do to cultivate customers for life.

