

## CUSTOMER CASE STUDY

# Expert ERP Group Redefines Data and Campaigns to Drive Greater Revenue with Less Effort



e2b teknologies has been working in enterprise resource planning (ERP) since before Gartner first coined the term in 1990. That's when Lynne Henslee, president of e2b teknologies, founded the company with her husband to help customers in industries like manufacturing, distribution, and cannabis develop, implement, and integrate business applications.

When these customers need help solving big business challenges, they turn to e2b teknologies for help improving inventory accuracy, schedule management, and shipping logistics. And in an age of constant flux and new considerations brought on by the pandemic, these customers need reliable ERP expertise more than ever.

**Industry** ///

Technology

**Location** ///

Chardon, OH

**Website** ///

[www.e2btek.com](http://www.e2btek.com)

## Sales and Marketing Should Work Together, Not at Odds

When e2b technologies first began tracking customer data, it relied on basic spreadsheets. Once the company reached 12 employees, it invested in its first CRM system. But as the company grew, the CRM functioned as more of a gigantic “catch all” than an actionable revenue driver. It was difficult to search, frustrating to use, and data was often inconsistent or inaccurate. More notably, the challenges it presented began driving a wedge between sales and marketing teams.

That’s when Lynne attended her first CRM conference and learned that other companies were using CRM in a completely different way—one that was prompting a complete paradigm shift in the industry. They were advocating for CRM as a company’s primary data hub to produce a clearer-than-ever 360-degree view of each customer, rather than the traditional reliance on ERP solutions to do everything.

“I came back and saw the world in a different way,” said Lynne. “If we used CRM appropriately, we could connect marketing, customer support, development, and sales and have a view of all the touches associated with a customer. It was an ‘aha’ moment for me.”

To make CRM as effective as possible for e2b technologies, Lynne and her team needed to reevaluate its existing solution and look for a system that would allow the company to organize and act on its data instead of simply housing it. e2b technologies knew it wanted a cloud CRM to replace its existing on-premise solution so sales could access the system when in the field. The company compared multiple CRM providers, but found that the bigger companies were not only too expensive, but overwhelming in their offerings.

### A Clearer Picture of Customer Data

e2b technologies turned to [SugarCRM](#) to activate its data, connect departments, and view all customer information in one place.

“Sales and marketing were able to function together versus in two different departments,” said Lynne. “We were able to quantify what we were doing. Even if the data wasn’t perfect, we knew we had to start somewhere.”

Yet, e2b technologies was using just one instance of SugarCRM to manage three divisions—its development business, consulting

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agency, and a calibration subsidiary—forcing the solution to become everything to everyone. Plus, e2b technologies wanted to begin nurturing leads in a more efficient way with marketing automation.

That's when the company brought on SugarCRM solution partner [BrainSell](#) to help it implement Sugar's new marketing automation tool [Sugar Market](#). Until then, everything was labeled generically as a campaign. With help from BrainSell, the team dissected the legacy data into four buckets based on which team it belonged to, devising a new system to organize incoming information.

"We were a clean slate," said Lynne. "BrainSell was willing to share best practices, what they themselves do, give us suggestions, and not just force us, but work with us. BrainSell is exactly what we look for in a business partner."

## Letting the Software Do the Work


Now with simplified, organized data, e2b technologies can actually use the information it collects to run reports and design ongoing marketing campaigns with point-and-click functionality. And because each team has a shared view, sales has immediate access to a host of granular data like email engagement metrics to assess customer interest and measure success.

Plus, e2b technologies uses Sugar Market to rank and score leads once they're in the funnel, assigning different point values depending on what content the prospect interacts with. Instead of employing one or two people to continuously assess leads, the tool automatically feeds more organic opportunities to sales with a goal of increasing conversions instead of relying on purchased lists or cold leads that waste time.

"It does the work of one or two people that don't have to spend their time identifying the warmest leads," said Josh Gilstrap, marketing manager at e2b technologies.

Today, marketing automation accounts for 15% of the company's marketing budget instead of spending it on employees to gather and analyze the data.

"I'd rather bring on additional sales employees to drive revenue than additional marketing employees to do tasks," said Lynne.



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The company's practice manager is able to easily send weekly reports to department heads with dashboards that keep the company up to speed on key metrics, giving employees time back to focus on more important tasks like building customer relationships.

Having a cloud-based CRM and marketing automation solution in one allows e2b technologies to connect and collaborate over a single hub of information, allowing teams to run leaner and even function remotely.

"Today, if it's not cloud-based, it doesn't exist," said Josh. "Sugar's ahead of the game in that regard."

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Marketing Manager,  
e2b technologies



#### SUGAR PARTNER

BrainSell, the growth enablement company, has been helping organizations uncover their strongest path to business growth since 1994. They provide unbiased software selection, implementation, support, data, and consulting services to clients of all sizes across North America.

<https://www.brainsell.com> // [info@brainsell.net](mailto:info@brainsell.net)

## About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit [www.sugarcrm.com](http://www.sugarcrm.com) or follow [@SugarCRM](https://twitter.com/SugarCRM).