

CASE STUDY:

# Smooth Sailing with SugarCRM

Star Asia, a Leader in Freight Forwarding Adopts Sugar for More Efficient Sales Prospecting.



Star Asia International, Inc.  
star-asia.com



Star Asia, a business in the transportation and logistics sector, provides best-in-industry services that enable clients to optimize their supply chain and maximize their resources. The company's service offerings include: ocean freight and air freight, customs brokerage, inland trucking & warehousing, cargo insurance, supply chain IT solutions and supply chain consulting.

Star Asia was introduced to UpCurve Cloud through their partnership with logistics services provider OEC Group, another UpCurve Cloud Sugar customer.

## Obstacles in the Water

Star Asia's top requirement was the ability to grow quickly. One of the challenges they faced with their previous CRM system was how to ensure that new sales reps immediately had leads and opportunities to work with. As a shipping company that resells container space on large freights coming to and from Asia, one of their primary prospecting sources is U.S. Customs data. Star Asia procures this data from Datamyne.

The methodology Star Asia previously used required them to do a great deal of manual data extraction from Datamyne. The Datamyne tool allows users to search by various fields such as where the shipment came from, where it's going and who the client is. Users had to filter the data, extracting the information they wanted, one by one. This made it challenging to get new sales reps up to speed and closing deals quickly.

## Rescued at Sea

To make this process infinitely easier, UpCurve Cloud built custom Datamyne functionality in Sugar and loaded two years' worth of customs data into Star Asia's Sugar application.

## Challenge

- Reduce time spent on searching for information on leads and opportunities in Datamyne
- Integrate Datamyne with the CRM

Now, Star Asia can for example provide a new rep selling out of Kentucky with the top five shippers into that state. This allows new sales reps to get up and running swiftly and more efficiently establishing relationships with new prospects, ultimately resulting in a faster sales cycle.

By implementing this rich customs data into Sugar, users can now, with the click of a button, see how much they shipped last year, where it came from, where it went to, who the shipper was and more, for each account.



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UpCurve Cloud and Star Asia expanded the customs data functionality to also build customized displays allowing users to see all of the different ports and shipping agents each account received shipments from in 2015, along with how many units came from each port. These overview dashboards eliminated the need for busy sales reps to flip back and forth between different data sources.

## Solution

- Custom Datamyne functionality in Sugar, enabling users to pull data with one click
- Custom Sugar dashboards containing account information

## Onboarding the Crew

It took a few rounds of collaboration and feedback between Star Asia and UpCurve Cloud to get the reporting of this data to display in a way that the sales reps could easily leverage it. But once we got it right, the sales reps were thrilled knowing that they no longer had to engage in the long, manual process in which they used to obtain the data. The reps were soon off to the races and the company experienced very little issues on the user adoption front, which most organizations typically struggle with when implementing a new CRM system.

Senior management – particularly the VP of Sales – was extremely happy with the outcome. The new system allows them to quickly see where the biggest opportunities are, with or without a sales rep assigned. The new data allows them to quickly decide whether to put a new team member on an account or if it's more appropriate for a senior sales rep.

In addition to the data on prospects and opportunities, very similar reports were created for Star Asia's current clients. The ability to see how their clients were doing year-by-year and from which ports proved more meaningful to management than it did to the sales reps, who are more interested in looking forward than looking back.

The new data within Star Asia's Sugar implementation is also now guiding their hiring process. Management is now able to see if there are a great deal of opportunities in South Carolina, for example, and make the decision to hire new reps in that region, doing more focused hiring in the areas of the highest opportunities.

## Sailing Ahead

Moving forward, another challenge Star Asia faces is that the pricing in the logistics space fluctuates quickly. Therefore, UpCurve Cloud has discussed potentially building customizations that allow them to manage their pricing online through Sugar. Instead of sending out an email with a spreadsheet attached and having to update it in two days when the rates change, they could simply display their rates live within the system, proving their reps with the most up-to-date information, in real-time.

## Heave Ho

The relationship between Star Asia and UpCurve Cloud was extremely collaborative. By having weekly meetings – many of them face-to-face in the Atlanta area – we were able to provide lots of revisions, along with the opportunity for them to see the system early-on and provide us with a great deal of feedback. We were able to make changes as we moved forward, as opposed to having a few large evolutions. This very open dialogue greatly contributed to the success of the project, allowing UpCurve Cloud to efficiently guide Star Asia, serving as true consultants toward accomplishing their business goals.

## Results

- Significantly reduced time spent on data entry
- High CRM user adoption
- Management is able to make better decisions on which team member gets assigned to opportunities and accounts



*"The relationship between Star Asia and UpCurve Cloud has been extremely collaborative. Our very open dialogue contributed to the success of the project, and they provided as with many revisions every step of the way, as opposed to having a few large evolutions."*

**Chris Hope, VP of Sales**