

# Case Study: Clancy Relocation & Logistics



## Leads are Moving!

A Growing Moving and Storage Company Leans on Sugar as a Lead Management Solution.

Clancy Relocation & Logistics is a growing moving and storage company, but they're not just about moving boxes. "We're about changing people's lives," says Elizabeth Domin, Marketing and Business Systems Analyst. Although she's joking here, studies have shown that only major, loss-related life events, like the death of a family member, the loss of a job, or a divorce, are more stressful than moving, so there just may be some truth to that.

Clancy has been providing commercial and residential moving and storage services since 1921. Founded in the Bronx borough of New York City, it became a founding member of United Van Lines in 1947 and to this day, participates as one of 120 UVL stockholding agents. Clancy currently operates from four (soon to be five) locations in New York and Connecticut.

Elizabeth came to work for Clancy five years ago, tasked with nurturing B2C and B2B brand recognition for the company's multiple business lines, as well as streamlining business process work flow amongst disparate business units. This includes software systems implementations (ERP, CRM, service desks), BI reporting, benchmarking, ongoing assessments, optimization and development of marketing campaigns, reporting on ROI, content creation/authoring/editing, overseeing web site revisions/redesigns, as well as engagement in other internal technology upgrade projects. As you can see, she's a very busy woman.



## CLANCY RELOCATION & LOGISTICS

<http://www.clancymoving.com>

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Elizabeth Domin,  
Marketing and Business  
Systems Analyst

## Up the Ramp without a Dolly

Prior to investing in Sugar, as with many small-to-medium sized businesses, Clancy's lead tracking was spreadsheet based. "When I came to this company, there was no CRM system," Elizabeth explains. "There were website leads coming through email and being put on a spreadsheet. Sometimes people would call in and that was never even being logged. It was all about a gut feeling. Management would ask, 'how's it going this week? Are we getting good leads? Yeah, okay great.' You would literally just ask people."



After a while, the spreadsheets were no longer cutting it. "They weren't being updated and when trying to create a report out of a spreadsheet, you only create a snapshot of what's going on, says Elizabeth. "It's static, not dynamic, not constantly changing. And in the case of a moving and storage company where we have customers for life, we want a customer to come back to us a year, 2 years or 5 years from now and we have their information available when they call in. We have an ERP system that's more for order management, but it's not for handling the lead or relationship."

Finally, Elizabeth had to ask herself, "As the volumes of leads grow, how do we keep track of them all, including the status, the next steps, who's responsible, and who it's assigned to?" That was one of the early challenges faced by her team. "It started off as me wanting it for marketing," she continues. "Then, because of the cost, we had to justify it by ensuring it was something sales could use too." Today, Sugar has become the backbone of Clancy's lead management strategy. "We had nothing before and now we have all the reports and insights you would expect from a marketing team."

Her next challenge came from the commercial side of the business. "Through our Van Line connection, some of our business is already being handled through their CRM system, so we had a way to track leads and opportunities on the household side, but we didn't have anything on the commercial side. We needed a solution for both lead handling as well as opportunity handling on the commercial side."

## Delivering the Best Benefits Package

Before deciding on Sugar, Clancy thoroughly tested and evaluated various CRM systems at different price points, with different levels of functionality. They developed a matrix with all of the features and benefits that would be nice to have, grading them on how important they were to the company on a scale of 1 to 3. "We actually evaluated several other systems, including Salesforce," explains Elizabeth. "When we compared features and benefits to the cost per user, Sugar came out on top."

As someone who had worked in the CRM industry prior to joining the team at Clancy, Elizabeth was already familiar with W-Systems, who she engaged as the Sugar partner during the evaluation process to provide deep knowledge about the Sugar platform. Therefore, once she decided to move forward with Sugar, deciding on a SugarCRM vendor was easy and W-Systems was up to the task.

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Clancy's top selection criteria included:

- Sales pipeline management
- Account Manager assignment
- Campaign analysis
- E-mail marketing
- Web-site(s) lead capture
- Web lead auto response

Currently, Clancy has eight Sugar licenses. However, they also have about 20 group users who don't need to log in at all. They just get notification alerts from the system. It wasn't necessary for the company to purchase licenses for every employee, only the active users. However, this may change in the future, as the company continues to grow. For now, Clancy has elected one person within the company to act as lead manager, they go in and update things for the entire team. This person is accountable for checking in with the people that don't log in, but only receive an alert, and keeping their information up to date.

- User friendliness for customer service
- Mobile app
- API capability
- Customization
- Cloud based
- Cost
- Quoting Tools
- Export to CSV/Excel
- Duplicate cleansing / prevention

## Relocation Motivation

"We're still working on buy-in with some of the more seasoned sales people. Getting them to sign in and use it every time can be a challenge. Sometimes they complain it's too much work and they don't know what to do," Elizabeth explains. "So some of it has been a little hand holding, but once they see what they can get from it, everything connects it starts to click and they see why they need to use it." Some of Clancy's top performing sales people have really latched onto Sugar. It's helping them to have visibility into all the opportunities that are going on with their accounts. They've found that leading by example is the best way to increase adoption throughout the organization. "The top performing sales people are doing well, and they are encouraging the others to join in."

## Unpacking Leads

Prior to implementing Sugar, Clancy had no true sense of how long it took a lead to go through each step of the sales cycle. "In the past, there was no time keeping. It was more reactive. The lead would come in and someone would reply-all to the email and say they had it and were doing something," Elizabeth explains. "We wouldn't know what happened to it afterwards. We also didn't know how many times that person was following up."

"Since we have implemented it in the last few years we can see that the volume of opportunities that are making their way into the pipeline, when it gets into the next stage of things, has gone up. We now put a priority on making sure we're following up with someone within the hour and now we can see that in the system and see who followed up within a certain time frame of the receipt. So we are able to use Sugar to make sure that we're reaching our responsiveness goals," says Elizabeth.

Thanks to Sugar, Clancy now has a greater sense of confidence that no opportunities are squandered. "We know that we're not missing anything. We know that we're not letting leads slip through the cracks. That's really important. We know that now whoever is assigned a lead is going to get a reminder from the system a few days later to check in with them and see how it is going," says Elizabeth. "That was previously

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Clancy utilizes Sugar for its workflow capabilities, their current system goes something like this:

- A lead comes in, via email, phone call or web form.
- If it comes through one of the websites, its automatically logged by

not being done and someone would have to chase the sales person down to ask what happened. Then there would be meetings about it. That's no longer necessary because you can just go in Sugar and see it."

Using Sugar has given Clancy new insight into the quality of their leads. "It provides me with reports and matrices that let me see where our leads are coming from geographically, says Elizabeth" This allows Clancy to change their marketing strategy in real-time, to take advantage of opportunities in specific areas. "Or if I see one of our divisions hasn't received as many leads as they normally do in the past few days. I can actually do something about that much quicker. Perhaps I'll schedule some campaigns to run to try to drive leads to that division or service," says Elizabeth.

This way, Clancy has an opportunity to fix a small problem, long before it becomes a big one. "I can look at what's coming through the pipeline and see there is a lot of volume coming in, but we're not converting as many and look into why. It simply allows the question, why is that?" Once the question is asked, appropriate action can be taken to understand the problem and eventually solve it.

Sugar has also enabled the Clancy team to learn from missed opportunities. "What if someone calls in and they are looking for a small move, but maybe we're just booked? That was actually one of the reports I ran last year, how many people in the summertime did we have to say no to because we're just so busy? In the past, a lot of that information was just not being tracked, because why would anyone want to track someone calling in asking to move on Friday when we can't move them on Friday? No one was ever recording that. But now we are, we're going to say it was a good lead, but it's dead," says Elizabeth.

Today, Clancy can look at a dead lead and ask themselves why they didn't book it. "Perhaps it was too short notice. But maybe that's something we can do something about, in a sense of publishing an article to our followers saying 'if you're looking to move, please call your mover weeks or months in advance because we just get booked and reach capacity.' That's really important to track when you turn someone away and why."

Other questions that could be answered by a well-maintained CRM system – "How many people requested piano moves? How many people are looking for things that we are just not interested in doing right now or we don't do or areas we don't cover? When you're thinking about expansion or growing your business you need to know how much other business is out there that you're turning away right now," says Elizabeth.

Sugar.

- The system generates a notification to the team saying here's what just came in with a link to view more.
- From there, they can change the status to contacted or converted – which is the ultimate goal.
- For leads coming in through email and phone calls, the lead manager will manually enter the information into Sugar and assign it to a sales person.
- The sales person decides if the lead is good or bad and can create an opportunity out of it or on the commercial side, they can create a quote and follow that order through to completion.
- When the order is complete, they can have Sugar send a notification to another system they use for order management.

“We’re handling a few hundred leads a month now so that’s good, but we didn’t know how many leads we were handling in previous months, because a lot of them weren’t even being tracked unless they converted into an opportunity.” Prior to implementing a CRM tool, Clancy thought their conversion rates were pretty amazing. “95% of leads that came in we were converting because they were only reporting the ones that were really good,” says Elizabeth. “Now we’re seeing everything, so our conversion rates actually look like they’ve declined, but we simply weren’t getting all of our lead information in one place before.” Sugar has given Clancy a more realistic view of sales and marketing performance.

Internally, there’s been an increase in management satisfaction since implementing Sugar. “Managers of other departments and divisions and even the owner of the company is happy to know that we’ve got a handle on this. If we’re asked how many leads we have and what happened to them, we can now answer that question very quickly and confidently,” says Elizabeth. Additionally, if the marketing team is asked ‘why are we spending so much on our website?’ It’s easy to show management how many leads came from it and what happened to them in order to justify its return on investment.”

## **Moving into a Room with a View**

For Elizabeth, Sugar’s reporting features are what really excites her. “What I call my 50,000-foot view dashboard is my favorite, because I can see the volume of leads have gone up and I can see it in real-time. As someone is working in the background, I’m able to keep tabs on that person and know what they’re doing by seeing these colorful charts and graphs. It’s a beautiful thing when you are working in a company and you can see volumes going up.”

“Plus, I’m responsible for the leads when they come in. I have a pie chart of all the leads for the month and I have to make sure that the sales people all get an even slice of the pie. They are responsible for different types of products like household, commercial, rigging services, etc. but I still have to make sure that the different divisions, and different sales people, in different territories, get an equal amount of leads per month.”

So what happens if Elizabeth takes a peek inside Sugar and sees that one particular sales person only got 5% of the leads for that month? “W-Systems actually made this little drill down functional piece, which I really like because I’m looking at a report and I can zero in and look at the details to see where those customers are coming from and if I notice that there is not a lot coming in from a particular area then I’m going to look into marketing to that area to get more leads for that sales person. It’s very convenient for me. And the sales people have been happier because they know that we are really considering them, making sure that their sales calendar stays full.”

The ‘drill down’ feature Elizabeth refers to is a wCare component and one of the many add-ons that W-Systems offers its clients beyond Sugar’s out-of-the-box functionality. W-Systems’ team of developers produce several modules and integrations that showcase the full flexibility that Sugar, an open source, web-based solution offers. Clancy was more than happy to take advantage of this component, to add value to their Sugar installation, at no extra cost.

As a growing organization, Clancy has been enjoying a steady increase in volume over the last few years. “Year over year, the volume of leads we’re handling has more than tripled. That’s the reason why we need this kind of system. Our volume of leads we were handling 2-3 years ago was a fraction of what it is today. Our web traffic has more than doubled year over year. You wouldn’t see all of that without a tool like this,” says Elizabeth.



*Clancy's monthly lead volumes over the last two years*

## **Unraveling Newfound Chunks of Time**

Thanks to a decrease in manual work, efficiency has increased for the Clancy clan. “I’m free to do other things. I’m no longer the one logging these things manually. That would take hours,” says Elizabeth. In September 2015, Clancy had 52 leads come in through the website, using a form. That may not seem like much, but if you have to sit in front of a computer and type into a spreadsheet 52 different names, email addresses, addresses, and zip codes, then update the status later on each one of those 52 leads, it gets cumbersome pretty quickly. There are times when the company is handling well over 200 to 300 leads per month. “What if you’re out on vacation for a week? They’re not getting logged? Sugar takes the actual work out of it for us,” explains Elizabeth.

Having a system like Sugar in place also allows there to be more focus put on the sales team and making sure they are getting enough quality leads. “Systems like this create more questions than answers because you get your initial questions answered right away. ‘How many leads? We have 72 brand new qualified leads.’ I can then drill down and see where they came from and how many are repeat customers, incoming calls, etc. We might do a campaign for a particular area and then I can see the volume go up in that area. There’s a huge time savings because now I’m not always reactive, I can be more proactive. I’m spending less time logging leads. I have made it someone’s responsibility now. I’m just overseeing it using this tool.” The time savings is huge for Clancy, particularly for Elizabeth herself. “I’m saving easily 7-10 hours per week.”

“Another key thing is making sure we don’t step on each other’s toes,” says Elizabeth. “As our sales team grows, managing all those leads and assigning them to the right sales person is a challenge, you don’t know who has what accounts. Sugar allows us to go in and see these are the accounts and these are the sales people for these accounts. Now, when someone calls in, the lead manager types in the search box the name of the person and might see that they work with someone else here already.” Sugar helps to make sure the lead gets assigned to the right person, every time.

The Clancy team doesn’t operate within one office, or even in one state. Therefore, it was important that they find a hosted online staff solution. “I didn’t want to go with anything in-house. We wanted an off-the-shelf solution that was customizable and that we didn’t need to work with developers constantly on,” says Elizabeth.

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*“For now, Sugar is my and my manager’s baby. I’m very happy with what we’re getting out of it,” says Elizabeth. “I didn’t want an Infusionsoft. I didn’t need a Salesforce. Nor is that something we could afford. We’re a transportation company, the margins are slim. It’s not like a software company. Our budgets are much tighter.”*

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## **Hauling Forward**

In the future, Clancy is excited about seeing what else Sugar can do to streamline their business. “We are looking into using it for touch point marketing and potentially lead scoring. In-between receiving a lead and booking the move we’re looking to do more outreach to our customers using Sugar to send them marketing emails. We’re also considering SMS integration so that we could potentially send reminders to customers before their appointments,” says Elizabeth. Now that Clancy has a proper lead management system in place, they are looking forward to being able to make decisions about how to further streamline their sales and marketing efforts in the future. And thanks to Sugar, the future looks oh so sweet!