

Case Study: EnableMe

EnableMe provides agnostic financial advice and coaching to individuals and families. Their driving ambition is to help people across New Zealand to achieve financial freedom. Since 2007 their financial personal trainers have enabled more than 4,000 Kiwis to achieve their financial goals.

Headquarters: Auckland, New Zealand
Customers: 4000
Founded: 2006

Staff: 30
Website: www.enableme.co.nz
Partner: CloudTech NZ Ltd



Introduction

Financial Personal Trainers

EnableMe define themselves as financial personal trainers, positioned in the space before traditional financial planners. Managing Director Hannah McQueen says her financial advisors help clients work out where their money is going and how to pay off debt (such as a mortgage) at an accelerated pace.

"When clients work with us, it's like a gym membership where they have regular check-ins with the personal trainer who specialises in finances" McQueen explains.

Touch Points

The common goal of EnableMe customers is to get ahead faster. Initially clients sign up for a 12-month period. There are nearly 60 touch points over that period that need to be tracked by the financial planners.

Clients typically deal with EnableMe's letter writing, sales, administration, consulting, accounts and support teams during the life of their contract.

"We need to closely monitor and analyse these touch points. A simple spreadsheet won't help us do that" McQueen says.

Background

Try and try again

EnableMe's Managing Director Hannah McQueen had tried numerous CRM systems, none of which could handle the precise nature of her business. Starting with manual spreadsheets, then moving to Microsoft Dynamics and a number of other CRM systems all produced unsatisfactory results for the business.

"We tried a number of different CRM systems. They always promised that they would give us what we wanted, but they didn't - and it wasn't until we started working with Sugar CRM that we actually had a CRM system that delivered value for our business."

The Leap of Faith

Dissatisfied with the previous CRM products she had looked at, McQueen was set on building a solution herself with the help of a developer. "The developer I worked with was adamant about using Sugar CRM.

After I spoke to someone from our Sugar CRM integrator, CloudTech, I realised these guys really know what they were doing and I had the confidence they had the abilities to deliver on what I was looking for. So I thought 'OK, let's give it a go'.

"It was a bit of a leap of faith because I have been burnt so many times before with other CRM vendors, but we worked really hard and built something that's pretty awesome to be honest!"

Future Growth Plans

Founded in 2006, EnableMe has since seen significant growth. McQueen plans to franchise the business nationwide throughout New Zealand and Australia within the next two years.

"After a while of using a poor CRM service, you get to the point where you inevitably start to drop balls and there is no easy way of getting reminded that the balls are up in the air!"

Obtaining a single view of EnableMe's customers and automation of processes became increasingly important for the company's growth plans.

Sugar CRM Customisation

As McQueen intended to use the Sugar CRM system to grow the business, she decided the best approach was for customisation of Sugar CRM using the standard SugarCRM configuration tools and workflow components:

"We have a very aggressive growth strategy, but to grow successfully you need a CRM system to support the volume of clients, as well as provide enough detail to allow us to successfully manage the quality and consistency of each client experience."

"Our support team deals with each branch and every client within the branch on a day-to-day basis. As such, we needed a system that would enable seamless client management between teams and the different office locations."

The initial build of the Sugar CRM system took around six months to complete from February-July 2014. Since then, with the on-going pivotal support of their Sugar CRM provider CloudTech, it has been regularly developed, customised and upgraded, keeping pace with EnableMe's rapid expansion and continued success.

Tangible Business Results

The Sugar CRM system has provided EnableMe with a lead management solution (from website queries) improved pipeline and client management and automation across the whole organisation, including shared calendars. This is available for all EnableMe staff members and franchise holders and has grown from two users to 35 users in a very short space of time.

SugarCRM Provides EnableMe with the following functions:

- The complete customer journey is mapped within SugarCRM: Leads are captured and become Opportunities, Opportunities are closed and become Programs. Programs are monitored and delivered and Invoices are created automatically from SugarCRM into Xero
- Process Automation is king: EnableMe are using over 60 different process automation rules to run their business. Reminders, Tasks, Meetings, Escalations, Program Renewals are all managed automatically across all of the different areas within the CRM system. This includes personalised email templates, SMS Messaging and automatic task creation for staff members. This ensures that EnableMe are able to manage by exception and focus on their customers, rather than worrying about administrative tasks

- Single View of the customer: SugarCRM finally gives EnableMe a complete 360 degree view of the customer. Everything is in one place. Reporting, KPI and Target Management for staff and the franchisees is now automated and significantly easier and the business is able to expand confidently with the support of SugarCRM

Having confidence in the Sugar CRM system has enabled McQueen to prioritise jobs, improve customer service and feel confident that opportunities were not being sidelined.

"Within Sugar CRM we have also developed a system to follow up with prospects; this has helped us increase our pending client conversion by 20 percent."

Administrative tasks have also significantly reduced and McQueen admits to "sleeping a hell of a lot better".

"We are growing at the same rate as we've grown previously but now client complaints have dropped to nothing. Most complaints had to do with the administration side of things not being processed properly; the follow ups are now so much higher"

CloudTech

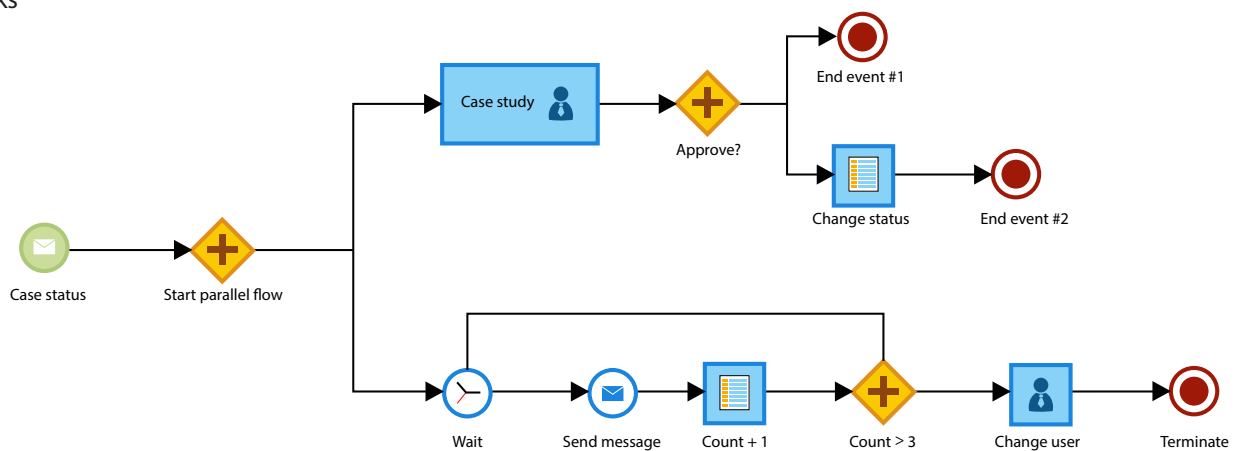
EnableMe's customised Sugar deployment has been implemented, developed and managed by CloudTech NZ Ltd. The CloudTech staff are fully trained across CRM and Marketing Automation and work diligently and conscientiously in order to achieve these outcomes for our clients.

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