



Customer Case Study

Puente Improves Marketing and Customer Service with Sugar Solution from GrowIT

Challenge

- Lacked a single tool to understand the needs of customers and communicate with them in a timely and effective way
- Required its systems to aggregate and manage customer information to support growth
- Wanted to integrate CRM functionality with the transactional system that executed customer trades

Solution

- Deployed Sugar in only five months
- Created modules for customer accounts; contacts, leads, and opportunities; email marketing; and a shared calendar
- Integrated Sugar with Microsoft Outlook and Puente's backend transactional systems

Results

- Increased volume of email marketing by 100 percent
- Reduced initial service response time by 30 percent
- Decreased the time to create targeted lists by 80 percent
- Cut lead to customer conversion from two days to mere seconds

Increased volume
of email marketing by **100%**



DESDE 1915



Now that we're using Sugar, Puente's email marketing is more effective, our lead-to-customer conversion time is less, and we can deliver business proposals quickly and efficiently to our customers."

Sebastian Blaustein, IT Manager, Puente

Industry: Financial Services

Profile: Puente provides investment banking, institutional asset management, and brokerage services to corporations, government entities, and individuals.

Website: www.puentenet.com