

Customer Case Study

SugarCRM Powers Expert Lead Management System for Bank of Marin

Challenge

- Needed a bank-wide system to manage opportunities and leads
- Wanted a unified view of customers with multiple accounts
- Tried unsuccessfully to use an extension of its FIS core processing platform

Solution

- Selected Sugar for its flexibility and cost effectiveness
- Provided all required functionality coupled with the necessary ease-of-use to boost user adoption
- Seamlessly managed long-term relationships regardless of staff changes

Results

- Enabled targeted customer outreach and close tracking of results
- Improved communication between departments that engage with customers
- Increased accountability and visibility
- Eliminated duplicate efforts, making prospecting more efficient

Enabled targeted customer outreach and close tracking of **results**



ELMS provides a lot of accountability for sales activity. We know how long an opportunity has been in the system, what we're doing with it, and what the probability is that we'll close it."

Peter Pelham, Executive Vice President, Bank of Marin

Industry: Financial Services

Profile: Bank of Marin (NASDAQ: BMRC) is the premier community and business bank in Marin County with 17 offices in Marin, San Francisco, Napa and Sonoma counties.

Website: www.bankofmarin.com