

SalesAgility



Case Study

Shoshana Technologies



CASE STUDY

Shoshana Technologies

Shoshana Technologies raises the bar with SuiteASSURED

CUSTOMER NAME:

Shoshana Technologies

CUSTOMER DETAILS:

Ann Arbor, Michigan

ORGANISATION TYPE:

Software Developers
(Healthcare sector)

EMPLOYEES:

11- 50 Employees

SUMMARY OF KEY BENEFITS:

- Secure solution
- Track customer journeys

Optimising business processes with SuiteASSURED

Shoshana Technologies has been providing software solutions to independent and franchise home care agencies in the United States and Canada for over 30 years. Their goal? To provide simple-to-use software that improves efficiencies and allows agencies to focus on providing excellent care while providing industry-leading customer service.

As a provider of Home Care Agency Management software, Shoshana Technologies needed to keep track of a growing group of customers, prospects, and partners. Having tried various other solutions, from Microsoft Access to Highrise to HubSpot they kept running into limitations that just didn't fit their high-touch customer service approach to business. They found that each system was designed with a specific focus in mind: some were focused on lead management, others on sales, others on managing customer interactions.

They see their customer and prospect base as a unified whole, which they call the Customer Journey. They strive to maintain a continuous relationship with each person as they transition between stages of the Journey. So, after exploring their many options, they finally decided to use an open-source model, something that could grow with them. They initially chose the SugarCRM Community Edition until the Community Edition was discontinued, at which point they switched to SuiteCRM.

The Challenge

Shoshana Technologies previously implemented SuiteCRM into their business operations in 2017 with the assistance of a local contractor. They had implemented several customisations into their instance during their time working together that made SuiteCRM a better fit for their business and their specific needs.

Just before the pandemic began, the contractor they had been working with stopped being available for the maintenance of their SuiteCRM instance, and while it continued to function, the lack of maintenance became problematic. They were desperate for help in restoring it to its former glory. So, when Shoshana Technologies approached SalesAgility, we were more than happy to help.

Key Problems Solved

SalesAgility collaborated with Shoshana Technologies to identify major issues with their SuiteCRM instance. SalesAgility corrected these by performing a security audit and developed a long-term strategy (which included a move to our secure SuiteASSURED solution) to allow Shoshana Technologies to drive value from their system once again.

- **Secure solution:** Shoshana Technologies was understandably keen to avoid any future security issues like they had previously encountered. SuiteASSURED was chosen as the best fit for their business because it is a separately maintained, tested, and

product-managed version of SuiteCRM that comes with a legal agreement that includes warranties, indemnities, support, and performance guarantees.

- **Track customer journeys:** Shoshana Technologies are big advocates for tracking customer journeys (which we love to see!) and needed a solution that would allow them to track and report on their customer base and prospects while also providing them with the insight they needed to further nurture these relationships. As a result, they required an instance that they could modify to meet their specific requirements rather than the other way around, which is exactly what they have ended up with.

Shoshana Technologies has grown revenues over 58%, thanks to the implementation of their high-quality SuiteASSURED system, which was customised to their specific business requirements. They've also greatly improved their ability to track and report on the people who matter to them by undergoing this process.

"... By the time we engaged SalesAgility, our instance of SuiteCRM was woefully out of date and in need of major updates and repair. As we were developing a plan to update it, we experienced a security issue (on our website, not our SuiteCRM or production servers) that caused a great deal of concern. They quickly identified the cause, helped us shut down the offending server and helped us understand our options. In the wake of that incident, they performed a security audit which revealed problems that had gone undetected for quite a while. They took steps to mitigate the immediate issues and developed a plan to address the long-term security of one of our core business systems, SuiteCRM.

Despite being several time zones away from us, the support team at SalesAgility has been very responsive and helpful throughout. Far more responsive, in fact, than our local contractor ever was!"

TOM VOILES, OWNER & PRESIDENT

About SuiteCRM

SuiteCRM is the world's most popular Open Source CRM with over 1 million downloads and an estimated 4.5 million users worldwide.

Key features include sales, marketing, and service modules. SalesAgility is the driving force behind SuiteCRM and the logical option for enterprises and organisations looking for professional SuiteCRM services, such as migrations, consulting, or training.

SalesAgility also offer SuiteASSURED a total care package for SuiteCRM.

For more info, as well as a free demo, check out: www.suitecrm.com