



## Drives quality data and system efficiencies for Climate Friendly

### The Client

Climate Friendly is a pioneering provider of innovative carbon management solutions to businesses and households that are ready to act to prevent climate change. Their parent company South Pole Group is the largest trader of Carbon Credits in the world and leading developers of emission reduction projects.

In a rapidly changing market, Climate Friendly spends all day, every day thinking about the best way businesses and households can take voluntary, sustainable action and create an engaging story around those actions.

“We are always talking to global suppliers, policy makers and those already acting against climate change, to ensure customers gain best practise information from all around the world,” says Climate Friendly Systems and Technical Projects Manager, Rob Asselman.

InnoventCRM came on board with Climate Friendly in September 2012 to manage the data migration from their existing CRM to SugarCRM, as well as assist with system adoption and initial customisation. This relationship has continued to evolve, allowing InnoventCRM to support Climate Friendly by providing increased ‘valuable data’ capturing of their potential and current clients, increased management visibility and other business automation and collaboration benefits.

### Business Challenges

The challenges for Climate Friendly are multiple, however they are not dissimilar to many other growing medium sized businesses.

**Firstly**, the sales cycle is generally long and involved with a large upfront education process required for potential clients. This involves multiple steps in the sales process as well multiple people from within the Climate Friendly team working on each prospective client’s account.

**Secondly**, data quality is the key to driving sales. A central repository of quality data was needed to drive this sales process and find not only the right contact people, but also build a history of correspondence with potential clients.

**Thirdly**, to drive staff adoption of the system, the right CRM needed to be user-friendly and provide access to quality data for all levels of staff in the business.

As Rob explains, “Before we moved across to SugarCRM and began using the services of InnoventCRM, we were not deriving the benefits from our old CRM system. We found it expensive and not user-friendly enough for both our staff and system administrators to use and modify as needed.”

This is where InnoventCRM came in.



**The key for us is storing the useful business/client data and not the useless information which we can now do thanks to InnoventCRM and their assistance with implementing SugarCRM with us.**

### **The Solution - SugarCRM with the consulting services of InnoventCRM**

InnoventCRM partnered with Climate Friendly to ensure SugarCRM was the right software solution for their business. It was a solution that understood the business challenges as well the initial key requirement of exporting the useful, historical data from the old CRM system across to SugarCRM.

SugarCRM has allowed Climate Friendly to use their client data to maximum benefit. The Climate Friendly team including the marketing department, sales department, operations, carbon manager and business development staff right up to the CEO now have access to useful client-based business data when they need it.

Rob is very happy with the professional and timely service provided by InnoventCRM. "They have been a reliable and professional technical support for our SugarCRM system, guiding us through data migration to assisting with customisation and technical questions as needed. We would highly recommend their services."

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### **Business Benefits**

SugarCRM supports the Climate Friendly team to store and disseminate the key client data needed for their complex business needs. It allows multiple departments in the business to communicate this data effectively and efficiently, reducing costs and encouraging collaboration.

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