

## Service Description:

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Customer relationship management (CRM) is a crucial function for most organisations. If a customer is left unsatisfied, it is up to the customer relationship specialists to resolve the issue. If they succeed, they are likely to keep that customer. Great customer service helps to improve customer satisfaction and loyalty, which can lead to improved customer, client or patient satisfaction.

With an integrated CRM software suite, a company can simplify the CRM tasks their employees must engage in. This leads to more efficient uses of company resources, which lowers overhead. These time tested business facts make CRM software invaluable to any business.

Described as 'visionary' in the Gartner Magic Quadrant for Sales Force Automation, SugarCRM software is our open-source CRM tool of choice.

At Affinity we offer a truly end-to-end solution to CRM implementation utilising SugarCRM. Our dedicated team help specify the best Cloud Hosting or SaaS levels and we can install, configure, customise (if required) and support your solution over the long term.

There is no need to change your business processes to match a proprietary system's default behavior. Affinity analyses your requirements and, where needed, recommend SugarCRM plug-ins to truly match your requirements at a granular level.

CRM is a (perhaps the) vital component of many organisations. It encompasses customer support, marketing and sales. SugarCRM is a web-based CRM tool that facilitates all of these business roles by bringing them together under a unified software system. This allows customer relations specialists to quickly and efficiently deal with a wide range of customer demands.

SugarCRM can be accessed through a website, which is usually Cloud hosted externally in a secure environment. However it can also be hosted internally. In either case only permitted employees of the company may access the website. Specialised telephony hardware can be incorporated with SugarCRM, allowing for easy integration of phone support into the CRM package. This can be accomplished by installing an IP-based phone system that links directly to the server that hosts the software.

SUGARCRM software is often used to track client orders, billing history, and catalog any issues. By placing all of this information under one unified software system, customer service specialists can access information about a customer rapidly. This leads to a faster turnaround time for customer service issues resulting in more accurate and faster resolution. By centralising all customer relation services into one unified system, the utilisation of each customer relationship specialist is maximized as well.

The advantage of SugarCRM over other CRM offerings is that it is free and open-source. This allows anyone to freely use and modify it. This free version is known as the Community Edition. There are priced editions of this software suite available to users as well. There are benefits to purchasing a priced edition, which include professional support, cloud-based storage, web hosting, and more. There are three priced offerings: Sugar Professional, Sugar Enterprise and Sugar Ultimate. Prices range from around £22 per user per month to £96 per user per month. (based on December 2014 pricing).

The number one reason that customers choose SugarCRM Community edition over other proprietary CRM systems is subscription cost. The applications essentially perform the same functions, but SugarCRM should be more attractive because it costs a lot less.

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With SugarCRM, you get more for your money. Even the lowest priced Professional Edition of SugarCRM comes with the automation feature set of workflow rules, web API access, and code level customizability. The Professional Edition of SugarCRM is priced at about £25 per user per month or £300 per user per year. This is less than a third of the price of a comparable 'best of breed' licensed proprietary CRM system. For a 10-user example, Sugar would cost £3,000 per year compared to about £12,000 per year for the equivalent 'best of breed' licensed proprietary CRM system.

Cloud computing with SugarCRM. Because the best cloud software packages are all built on compatible platforms, many can be integrated with each other in ways that local, server based software cannot. You can get the 'Best of breed' cloud CRM software (Sugar), the 'Best of breed' cloud ERP software (odoo), the 'Best of breed' cloud email marketing tool (Mail chimp), and have them all integrated and working together. Try that with server based software!

Affinity also has a great deal of experience in the specification and development of customised plug-ins and/or bespoke development. Indeed our open-source Customer Relationship Management Consultants have never come across a requirement that cannot be met by existing module customisation and/or bespoke module development.

## Affinity:

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**Affinity has been successfully operating since it was founded in January 2004 (winning best new business of the year at the 2005 CBAs and numerous awards since). It has recently achieved significant organic growth (despite the current global market difficulties) with sales revenue increasing year-on-year and into the current financial year - cementing its strong financial standing. The company remains independently-owned with a strong balance sheet and order book.**

Putting the customer first is at the core of what we do. Only if the customer is satisfied will we have achieved the right result. And it is only through creativity and innovation that customer satisfaction can be ensured. Meeting the needs and demands of the customer always, in our experience, involves going the extra mile – finding often unexpected solutions to emerging requirements and challenges

## Affinity's Processes:

### Affinity Project Management

Affinity is in an excellent position with its multiple methodology offerings. We recognise that there is not a “one shoe fits all” approach to delivering successful projects and have developed and matured our own processes to match the differing needs of our diverse client base.

Our mainstay method utilises a core iterative development team following tried and tested Scrum agile principles. We have tailored the entry points to this core competency to enable us to support everything from formal “waterfall” engagements to “full agile” projects and most things in-between.

Ultimately we have modelled our approach to suit the needs of our clients rather than dictating one specific engagement process; we can fit in where you need us and deliver in a way that gives you the most benefit. As a key to this, early in any engagement we help our customers understand their own strengths and competencies in project processes and produce an offering that dovetails into a customers’ organisation rather than being at odds with it.



### Affinity Waterfall

Many of our clients are seeking a traditional waterfall engagement and we equally welcome that approach. If there are no significant uncertainties in your own requirements, we will work with you in an elaboration phase to formally detail them together. Once defined, we will happily deliver against a set budget and specification. We add some further value to this approach by vertically or functionally dividing up your requirement in-house and iteratively developing it within our Core team. This means that change control can be managed better (and minimised) should your documented vision change or something unexpected happens.

## *Affinity Agile Hybrid*

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We are realists – we know that a full Agile engagement across company boundaries is hard to achieve and also in an uncertain world that Waterfall requirements can and do change. Unless an organisation has reached a reasonable level of Agile ‘maturity’ it may actually be culturally or organisationally impossible for them to work in a fully Agile way. We can solve this and we will do this in two ways:

### *1. An ‘out of the box’ approach to technology.*

We will select and propose suitable open source packages, modules and templates that we believe can cleanly offer the solution that you are seeking ‘out of the box’ without the need for fundamental code writes at a low level. We promote taking this more straightforward approach to technology choice so that we can deliver you business value as soon as possible rather than building something from scratch.

Any package solution will require levels of configuration and customisation, however if the underlying business processes that they offer do indeed deliver your needs, then there is no need to re-specify those processes in agile story cards, and carry out a detailed business process mapping before we can start delivery.

### *2. A lightweight Agile backlog*

Tied neatly to the above, we will embed our own agile expertise into your project and guide some of the Analyst and Product Owner activities particularly in the early iterations. Most importantly as we will have proposed technologies that minimise the need for the detailed requirements work that consumes a lot of time, you will be able to step back a little from the daily refinement and story breakdown work that would be present in a typical Full Agile engagement and predominantly focus on acceptance of the project deliverables at the end of each iteration.

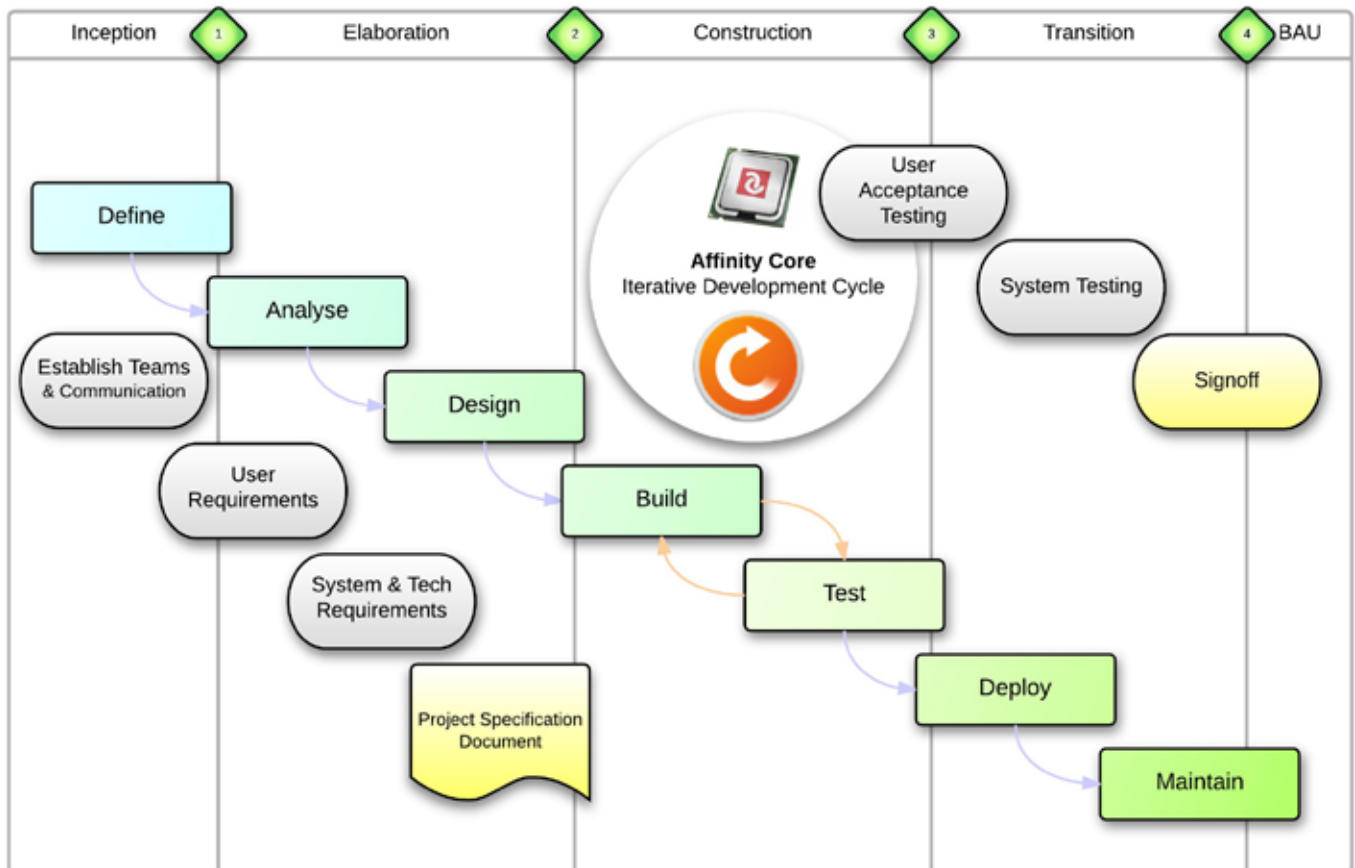
## *Affinity Agile*

Our full Agile project process works on an iterative backlog definition and refinement cycle that feeds into our core development scrum process. This is an industry standard approach and as well as operating perfectly on its own, can also plug into large-scale Agile programme methods such as the Scaled Agile Framework (SAFe).

This highly collaborative approach puts your project at the heart of our company and delivers a cohesive end to end process from your Project Roadmap, Product Owners and Analysts downwards. We will justifiably have high expectations of your consistent daily engagement with us in stand-ups, refinement sessions and story-card workshops to make your project a success.

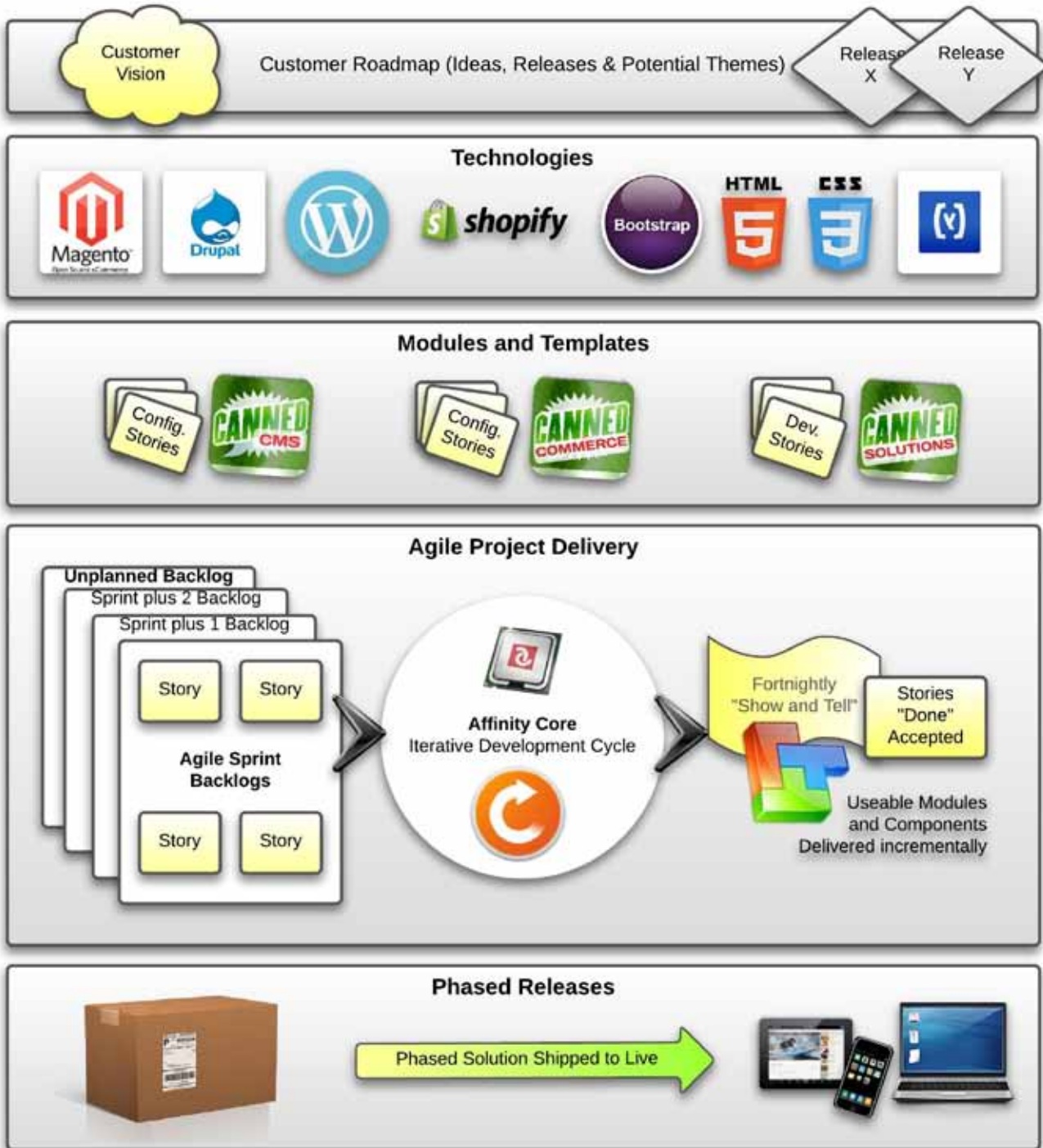
Affinity Agile

For a full definition of Affinity's Waterfall approach go to: [www.affinity-digital.com/waterfall](http://www.affinity-digital.com/waterfall)



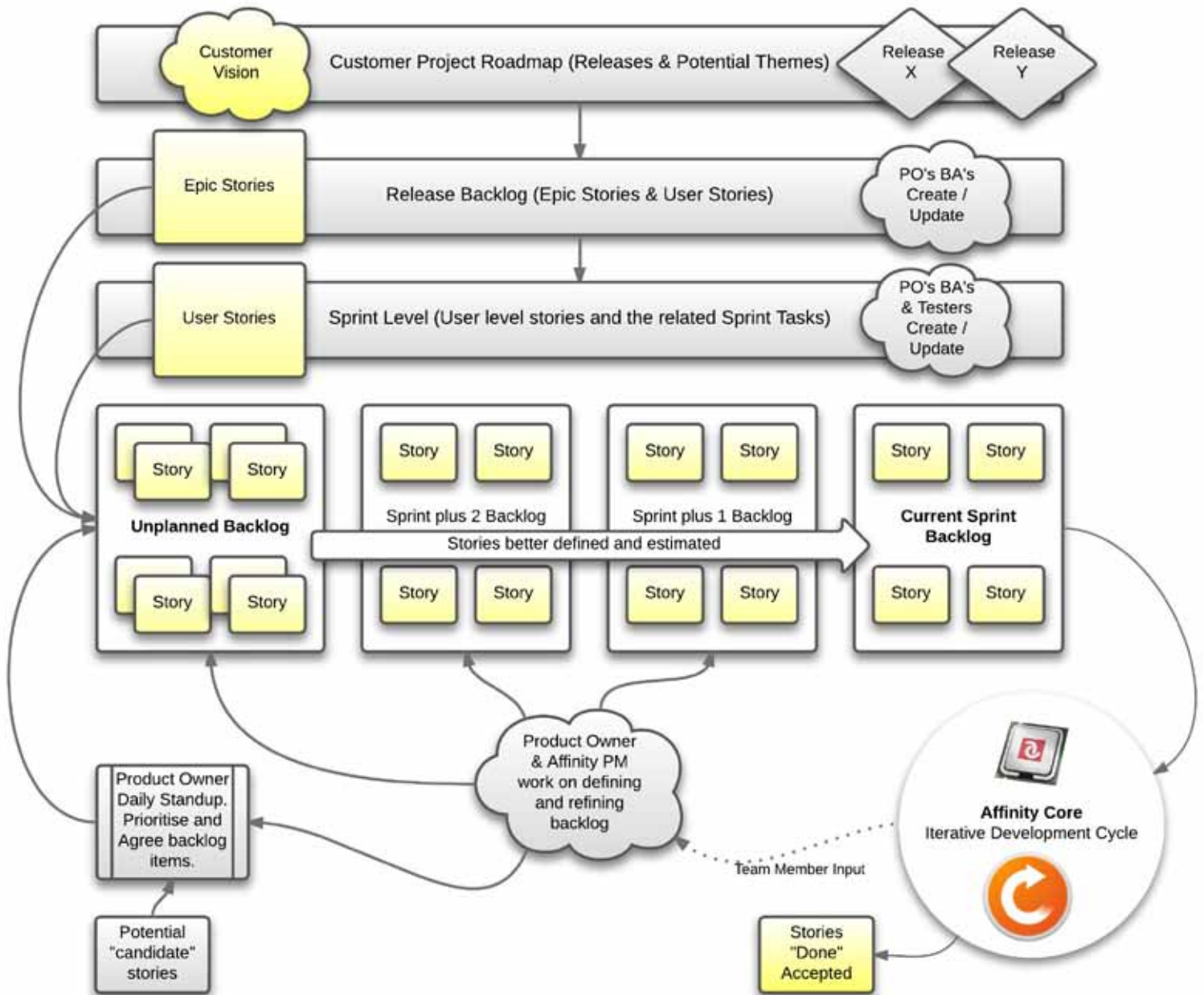
## Affinity Hybrid Agile

For a full definition of The Affinity Hybrid Agile approach go to: [www.affinity-digital.com/Hybridagile](http://www.affinity-digital.com/Hybridagile)



Affinity Full Agile

For a full definition of The Full Agile Requirements Backlog go to: [www.affinity-digital.com/agile](http://www.affinity-digital.com/agile)



"Affinity does, from time to time, use freelance (contract) staff on our projects if the scale demands it. These freelance staff are well known to us and are well versed in our processes and procedures."

**Who we do it for:**

We work with a range of clients using the SugarCRM platform for Extranet and Intranet solutions ranging from Blue Chip Contracts to Marketing solutions for SME's. This is one of the key benefits of the SugarCRM Platform – its scalability.

***Clients and solutions of note include:*****Client: Solar Solutions**

Profile: UK based Seller of Solar PV panels and Installations

Projects: Cloud Hosted CRM

Platform: SUGARCRM

Sector: Environmental

Applications: Websites, Intranet/Extranet, Asset Management

**CASE STUDY:** Please go to [www.affinity-digital.com/casestudy/solarssolutions](http://www.affinity-digital.com/casestudy/solarssolutions)



## Affinity's Associated Services:

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### *Business Analysis*

One of the most critical components of the affinity team are the web business analysts. Without this crucial role, our Developers and Project managers will be unable to effectively complete their tasks. A web business analyst identifies the needs within an organization that correspond to the sphere of the online world. They are also charged with determining an appropriate course of action or solution depending on needs of the company. "Web Business Analysts are essential to linking the business objectives and the technical capabilities," Our clients want to achieve their goals, but they may not understand the technical limitations in what can be done, in terms of resources, technology, and the time available. Our web business analysts are the link that gives better understanding to both sides.

### *Creative Design Services*

We believe that good design is fundamental to any successful project. Making good use of graphic design principles allows us to:

- Create attractive and engaging solutions for our clients;
- Maximise ease of use and facilitate the users' journey through any website or application;
- Enhance and drive forward the client's digital brand in support of their wider marketing strategies.

We focus on the usability of your website, making sure that your customers' interactions with it is enjoyable and without confusing or superfluous obstacles that may cause them to disengage or abandon their journey. By applying these principles to your website, we will be able to deliver against your requirements in a way which will not just enhance your visitors' experience but will also strengthen your brand in support of your wider marketing strategies.

Our design team are fully conversant with the implications of developing a truly fully responsive in design, meaning that whatever platform (screen size and resolution) the website is viewed on. the web page is optimized to deliver the best and most appropriate view of that page. The beauty of 'open source' software and Drupal in particular is that we can demonstrate this technological approach and many of its other features on a 'play before you pay' basis).

### *Use Cases*

Well-written use case narratives (or simply "use cases") offer affinity's analysis, development, and testing teams an invaluable guidebook. A use case is a formalized story that describes how someone procedurally interacts with an existing or proposed system and they should be part of every project managers' permanent tool set. Well-written use case narratives (or simply "use cases") offer the analysis, development, and testing teams an invaluable guidebook. A use case is a formalized story that describes how someone procedurally interacts with an existing or proposed system and they should be part of every project managers' permanent tool set.

### *User Journeys*

At affinity we ensure we understand the underlying problem before attempting to solve it and then make things simple and intuitive. Acknowledging that the user is not like you and having empathy is the key to a great User Journey. When we really get what makes people tick and why they do what they do, we'll have a much easier time making their visit better.

## Affinity's Associated Services:

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### *User Experience Design*

When someone is trying to get something done, they're on a mission. Don't interrupt them unnecessarily, don't set up obstacles for them to overcome, just pave the road for an easy ride. Affinity's UX team will create designs that have intentional and obvious paths that will allow people to complete tasks quickly and freely. We will create a visual hierarchy that matches the user's needs, Provide signposts and cues and of course make actions reversible. Our mantra is - Less is more. It is important to make sure that everything in the design has a purpose. Some things are purely functional; other things are purely aesthetic. But if they aren't adding to the overall positivity of the experience, then we'll take it out. Finally be consistent Navigational mechanisms, organizational structure and metaphors used throughout the design must be predictable and reliable. When things don't match up between multiple areas, the experience can feel disjointed, confusing and uncomfortable. People will start to question whether they're misunderstanding the intended meaning or if they missed a key cue. Consistency implies stability, and people always want to feel like they're in good hands.

## Other Affinity service offerings:

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*Open Source Website Consultancy*

*Open Source Website Development*

*Drupal Development*

*Magento Development*

*ERP - CRM Implementation*

*Open ERP odoo Implementation*

*Open Source software Development*

*Software Integration Specialists*

*Open Source Flexible Assessment Systems (FAS)*

## Making Contact:

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