

THIS IS HOW i CRM: **VetAdvisor** Expands Reach to Thousands of Military Veterans



INTRODUCTION

The moment you meet CTO Paul Handly and his platoon at VetAdvisor, you can feel the deep respect and commitment they bring to helping military veterans adjust to civilian life.

These administrators, life coaches, and IT staff are the advisors and guides to thousands of military veterans. Many are veterans themselves.

They battle to help veterans return to civilian life – obtain an education; reconnect with spouses and children; or perhaps just get a decent night's sleep. To find life after Tikrit. After Kabul. After Khe Sanh.

Sugar is a key part of the processes that help veterans step away from the battlefields and re-acclimate to life at home.

VetAdvisor has leveraged Sugar's robust functionality and easy, cost-effective customization to support and manage the company's unique mission. The result is a powerful CRM-driven system that complements the work of the coaches and increases the probabilities of a veteran's successful transition to civilian life, Paul says.

Through Sugar, VetAdvisor manages the client life cycle and coaching operations under a single platform that optimizes data collection and analysis. It combines self-monitoring and evidence-based tracking of outcomes, and increases veteran engagement.

ABOUT VETADVISOR:

Description: VetAdvisor is the nation's expert in veteran-centric holistic care, providing proactive coaching services across behavioral health, wellness, financial, and all aspects of transition and career development. The company also consults with corporate human resources and management teams to teach organizations how to recruit, retain, and interact with military veterans and service members.

Headquarters:

Falls Church, VA

Founded: 2007, by a former Navy officer

Staff: 120

Website:

www.myvetadvisor.com



CHALLENGE: Automate workflow processes to amplify coaching staff's ability to provide personalized service to a growing number of veterans; increase data integrity in managing veterans' programs; and conduct proactive marketing outreach on mobile and online platforms.

SOLUTION: Sugar Professional, branded as Veteran Relationship Management, cloud-hosted and deployed to 100% of VetAdvisor's coaching staff.

RESULTS: Saved 500 hours per coach per year by automating and facilitating outreach at scale; ensured adherence to strict government privacy and compliance guidelines; increased effectiveness of coaching team and limited staffing overhead costs; improved services tracking and trend spotting to drive executive decision making.

EXPANDING OUTREACH, ENGAGING VETERANS

VetAdvisor is proactive, reaching beyond the voluntary inclusion of most federal or state-related veterans' agencies. Using Sugar-integrated databases to locate veterans and reach out to them directly, VetAdvisors sidesteps the chasms to receiving care that confront so many vets.

Online and mobile outreach, coupled with integrations with military-identifying databases, allows veterans to forgo long lines, intake forms, and frustrating paperwork. This approach is highly personalized, offering vets an understanding and supportive experience from the first interaction.

"We're using Sugar to go where the veterans are," says Paul. "The array of services is a highly fractured environment, and that is going to be confusing and disheartening to a veteran. So instead, we are learning about veterans and driving content to them, in a virtual world, on a phone, on a website. We send veterans a customized survey and don't make the veteran come to us."



"Using Sugar, we are learning about veterans and driving content to them, in a virtual world, on a phone, on a website."

Paul Handly
CTO, VetAdvisor

'IN A WAR ZONE FOR OUR PEOPLE'

"I wish I had Sugar when I was commanding 12,000 soldiers in five countries," says Sergeant Major (Ret.) Harry Zeznanski, the VetAdvisor CRM administrator whose 34 years in the Army spanned Vietnam to Iraq and Afghanistan. "At a glance here, I can see what all of our people are doing and what the trends are."

Seeing those trends – identified through Sugar's customized reports – is critical operational intelligence for Harry, Paul, and Jennifer Roseman, VetAdvisor's Vice President for Coaching Services.

Sugar is a trusted teammate in their efforts. At VetAdvisor, Sugar's tactical name is the Veteran Relationship Manager. It is the collection point for all data related to veterans.

"We're in a war zone for our people every day, trying to save or improve lives. The difference between this and combat is that with Sugar I have real-time information. That makes me more effective as a leader when I can see at a click who that person is and what they have done...what they need," says Harry, a former coaching team leader.

Because Sugar is customized to match programs to profiles, coaches have military, family, career or education resources at their fingertips.

Using integrations such as Fitbit, VetAdvisor coaches can even monitor a client's wellness or sleep program through the data logged in Sugar.

"We can look at the case to see the milestones, and the coach can reach out and ask if that person missed their run or had a bad night and do they want to talk about it," Harry says. "Sugar helps us be proactive."

CASE MANAGEMENT KEEPS RELATIONSHIPS GROWING

While Sugar provides multiple levels of information to VetAdvisor, its foremost function is case management. The primary users are the VetAdvisor coaches, who spend 45 to 60 minutes on each call as discerning listeners and practical guides to the veterans' various needs.

With more than 700 contacts per month, the sheer volume might threaten that personalized time with veterans were it not for Sugar and the workflows.

"There isn't enough money to hire all the coaches we would need to have. We turned to Sugar to amplify the ability of all our coaches," says Paul. "We don't have to spend as much time doing administrative things – like reminder calls or sending a source document – everything is organized and at the coaches' fingertips in Sugar."

Elizabeth Curfman, a VetAdvisor coach who focuses on career management, thinks she saves 15 minutes every hour by not having to duplicate notes into multiple databases. One entry in Sugar is all that is needed.

"Sugar gives me more time to spend with the client. I feel better about that and I am sure the client does as well," says Elizabeth.

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**Elizabeth Curfman,
Career Coach, VetAdvisor**

SUGAR AS 'A FORCE MULTIPLIER'

As the vice president of coaching services, Jennifer sees how the Sugar-driven processes and integrations provide up-to-date information about clients, keeping coaches well-informed.

If, for example, a client who agreed to wear the Fitbit monitor is not wearing it, Sugar automatically notifies the coach.

"That by itself is such a force multiplier," Jennifer says. "We approach our work from a relationship perspective, so someone not wearing their Fitbit might signal other issues we want to be aware of."

Like any commander, Paul looked at options when considering Sugar as his CRM. He wanted flexibility, the opportunity to get deep on analytics, and a platform that would be stable through every update. It had to be fast, smart, and flexible in a world of changing technology.

Today, his declaration of victory in the CRM search is evident:

"High-tech, high-touch coaching is the heart of our process, and Sugar is the basis from which technological solutions flow."



"We approach our work from a relationship perspective."

Jennifer Roseman,
Vice President for Coaching
Services, VetAdvisor

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Sergeant Major (Ret.)
Harry Zeznanski,
CRM Administrator, VetAdvisor

SOLUTION PARTNER



VetAdvisor's customized Sugar deployment has been developed, implemented and managed by Ticomix. Recognized as a Rising Star SugarCRM partner, Ticomix fuses industry-best practices with award-winning technologies to provide premiere technology solutions to small- to midsize businesses around the country in the areas of networking, data backup/recovery, customer relationship management, service desk management and a host of other customized software and hardware solutions.

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CUSTOMIZATIONS AND INTEGRATIONS

INTEGRATIONS

- **Twilio:** Facilitates and tracks all SMS communication between coaches and clients.
- **Fitbit:** Activity tracker that sends data to Sugar, allowing coaches to measure client activity in real time and monitor goals.
- **HighCharts:** Provides visualization of Fitbit activity.
- **ID.me:** Used for verification of client affiliation with military and present service status.
- **Clicktools:** Surveys and questionnaire templates for coaches and clients; results stored in Sugar.
- **Telax:** Enables outbound click-to-call and relevant information pop-ups for inbound calls.
- **Collabspot:** Synchronizes Sugar and Google apps, including emails and calendars.

CUSTOMIZATIONS

- **Milestone Velocity:** Uses formula that calculates how well the client is meeting their personal plans. Velocity changes are calculated continuously based upon the plan, accomplishment against the milestone, and time.
- **Database integration:** Draws on a variety of public and government databases to locate veterans and ensure they are maximizing their Veterans Administration benefits.
- **Contacts:** includes click-to-call, click-to-SMS and survey tools.
- **SMS:** inbound and outbound messaging viewable by coaches and staff.
- **Sleep:** Populated by Fitbit feed with details about sleep activity; can be viewed in Contact Record.
- **Activity:** Fitbit feed for monitoring client's physical activity.
- **Personal Plan:** Log of all plans for each client. Clients can have multiple plans depending on the types of coaching they are receiving.
- **Goals:** Customized view of individualized performance metrics set by client and coach.

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