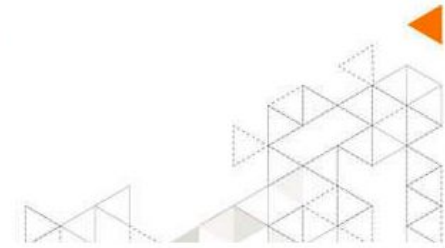# Aurik+Vtiger

Challenges

Aurik is a business incubator and accelerator business. At any given point of time, Aurik's team works with about 350 small and medium business clients. Over the course of 6 months, mentors and facilitators working for Aurik typically hold 7000 face-to-face meetings with their clients. Aurik needed a system to efficiently track all customer interactions and automate internal processes.

CRM Requirements

1. Ticketing and SLA management
2. Project management
3. Reporting
4. Ease of customization
5. Intuitive

The Solution: Vtiger CRM

Aurik could easily customize Vtiger to fulfill all it's requirements. Vtiger's intuitive user interface helped the team get up and running quickly. Vtiger helps the team track progress on projects and facilitate handover processes between team members. And with dashboards and custom reports, the managers can quickly identify any bottlenecks and facilitate team operations.

Benefits

- Improved visibility into team activities
- Streamlined management of project
- Improved turn-around time of scheduling customers to their mentors

Customer's Quote:

"For me what made all the difference was Vtiger's ability to self-configure itself to work for Aurik. The way in which we can configure Vtiger is really simple. And because of this simplicity, we were able to build a tool that really worked for us."

-Carien Engelbrecht, COO at Aurik

About the company:

Aurik is a business accelerator that works with entrepreneurial business owners and corporate clients to improve business and supplier performance through innovation, business development and opportunity creation. Established in 2001, Aurik has grown impressively with y-on-y growth in excess of 200% for over the last 4 years and stands as a leader in their market space. Aurik employs in excess of 150 people including mentors and facilitators who have supported over a thousand small and medium enterprises since its establishment.

Challenge:

At any given point of time, Aurik works with about 350 small and medium business clients. Over the course of 6 months, mentors and facilitators working for Aurik typically hold 7000 face-to-face meetings with their clients. Right from its first days, Aurik knew that it needed a tool to track progress and generate reports on projects to facilitate handover processes between team members. When Carien Engelbrecht, the Chief Operating Officer at Aurik, was looking for a solution her IT provider at that time suggested Salesforce. "I looked at Salesforce and I hated it," says Carien. "It was too complicated. I wanted a CRM system that offered more functionality than what a normal CRM does but would still be easy to use."

Solution:

> *"For me what made all the difference was Vtiger's ability to self-configure itself to work for Aurik."*

In addition to its integrated project management, reporting, and robust case management with powerful SLAs, Aurik selected Vtiger in part for its extreme ease of adoption. "For me what made all the difference was Vtiger's ability to self-configure itself to work for Aurik, " says Carien. "The way in which we can configure Vtiger is really simple. And because of this simplicity, we were able to build a tool that really worked for us."

Everyone at Aurik opens Vtiger even before they open Outlook

A typical day at Aurik begins with employees logging in to Vtiger. " Everyday, the first thing I look at is the dashboard," says Carien. Vtiger's dashboard gives Carien a precise snapshot of what's going on in her various teams. She gets quick access to project task status, pending tickets and cases – that directly affect the flow of the business. "When I'm looking at the dashboard, I'm trying to see where the problem is. Let me explain. We use tickets extensively – everybody at Aurik gets uses and gets tickets. The scheduling team that schedules meeting

between our clients and facilitators get ticketed whenever a client or facilitator cancels. I watch the volume of tickets sitting with different schedulers from the dashboard. If I spot a schedule with a lot of tickets that are unresolved, I know there is a problem. That is to say, the dashboard helps me identify if someone is not coping for some reason so that I can help them with some training or redistribute the workload so that the business runs smoothly."

Aurik uses Tickets in two contexts. The first is ticketing of the scheduling team members when a client or facilitator cancels. In the second context, the facilitators get ticketed when the entrepreneurs they work with raise a red flag. "Facilitators work with SMEs all the time. Because we are a business accelerator, we need to know when a small business client is running into trouble. Through tickets, team members are able to draw attention to business problems so that we can provide support quickly. So when I switch on Vtiger the dashboard immediately gives me the sense of the temperature of the business"

> *"When I switch on Vtiger the dashboard immediately gives me the sense of the temperature of the business"*

Aurik couldn't work the way it does without project tasks and reports

"From the management point of view, the dashboard shows me the volume of the project tasks that begin and end in a month. That gives me an immediate indication of my capacity thresholds and helps me balance and manage the capacity going forward. "

Every client is enrolled in a customized Programme comprised of a large number of discrete activities (project tasks). Before using Vtiger, it was extremely difficult for Aurik to track project tasks. Tracking progress on project tasks is critical for Aurik to work successfully. "We built our business from Vtiger up. The biggest benefit from Vtiger is that I can track where we are on a program for a client." We can see who is on track and who is falling behind.

> *"We built our business from Vtiger up. The biggest benefit from Vtiger is that I can track where we are on a program for a client."*

Vtiger helped us improve our turnaround time of scheduling customers to the mentors

When Aurik started using cases in April there was a massive number of violations and today they don't have a single violation.

"When a new client starts working with us, we have to schedule them quickly. Before Vtiger introduced cases module, we were struggling with turnaround times. With Vtiger's Cases module, we were able to configure cases and create a workflow that would pass the client from one stage to the next without any delay. We set up SLA and measured the performance against the SLA. My team members can now see within what time frame they have to finish the work. Until we had this visibility into our team's performance it was all a guesswork."