

CUSTOMER CASE STUDY

Manufacturing company manages more than 200 new leads per month



UNIRROL is a family-owned SMB based in Argentina, specializing in heavy-duty manufacturing and distribution of intralogistics products. Think forklifts, conveyors and shelving racks.

UNIRROL's biggest pain point, like many growing SMBs, was that customer information was scattered, disorganized, and rarely maintained. Sellers kept track of their own customer data manually, and if a rep left the company or even went on vacation, management lost visibility into every activity they were handling.

In 2009 UNIRROL worked with GrowIT, a longstanding Sugar Certified Partner in Latin America, to make the leap from spreadsheets to Sugar, starting with the free version, then upgrading to the licensed version in 2014.

Today, UNIRROL is running the latest version of Sugar Sell, which has enabled them to implement AI capabilities and automate an external marketing process with WhatsApp.

Precision selling built on better understanding

Sugar helped UNIRROL centralize all customer data. So, for marketing campaigns, they could log every source and touchpoint, from newsletters, holiday greetings, print ads, expos, and communications to face-to-face visits and phone calls.

Now sellers have a trusted, easily accessible source of customer data and opportunities. Reps can look up a customer and immediately see their history and the latest quotes. They even set up alerts to flag accounts with no activity for several months so they can be reassigned.

"Sellers often believe customers remember them forever, says María José Michelotti, owner and general manager of UNIRROL, "but they don't!"

By building a consistent process with better data hygiene, reps have more clarity and insight into each opportunity and can better prioritize their time.

Integrating Marketing and Sales

UNIRROL integrated an automated marketing process using WhatsApp with Sugar. When an ad is clicked, it's routed to WhatsApp Business, where an AI bot answers the query and a lead is automatically created in Sugar, showing where the lead came from and what the next steps are.

Meaningful visibility

According to Natalia Suppo, commercial administration at UNIRROL, Sugar is both user friendly and visually clear: "Dashboards give us invaluable visibility – which leads convert, which opportunities have the highest value, and where sellers should focus," she says.

Industry

Manufacturing

Location

Argentina

Company Size

11-50 employees

Website

www.unirrol.com.ar

"Sugar empowers the sales team to work with precision instead of chasing every opportunity. Reps can filter data their way, identify what truly matters, and concentrate their efforts where they generate the greatest impact."

– HERNÁN HÖRL,
Sales Manager



Each seller's monthly performance can be reviewed, such as lead inflow, opportunity volume, closure rates, follow-up compliance, and SLA adherence. They track win/loss details and monitor pipeline behaviour to help identify patterns and uncover pain points.

Teams easily track KPIs, and customer satisfaction surveys are automated to deliver great feedback to sales and marketing teams. Even pulling a report takes just a couple of minutes, and deal analysis can be performed quickly.

Flexibility that leads to freedom

Even when sales volumes fluctuate, UNIRROL has seen meaningful improvements: less noise, fewer unnecessary emails, and a single organized communication channel. "It gave us the space to focus on strategic initiatives – something unimaginable before," says general manager Maria.

UNIRROL is now managing more than 200 new leads per month, with a 45% conversion rate to opportunities.

What stood out the most to sales manager Hernán Hörl was Sugar's flexibility. "I've used other CRMs that are rigid and 'boxed in.' Sugar adapts – not only to our company's process but even to each seller's way of working," says Hernán. "Sellers can organize and filter their accounts and opportunities however they see fit. You don't get that level of customization from other systems."



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About SugarAI

SugarAI goes beyond traditional CRM to power account-first, AI-driven selling. Our Precision Selling platform helps sellers win and grow the accounts that matter most by uncovering hidden risk, revealing expansion opportunities, and guiding every next move for complex, relationship-driven businesses.

Learn more at www.sugarai.com