



CUSTOMER CASE STUDY

Niftylift elevates efficiency with SugarAI

Service professionals rely on Niftylift to reach their work through mobile elevating machines like boom lifts, cherry pickers, and access platforms. As one of the industry's largest manufacturers of lift platform rentals, the company is also a pioneer and specialist in compact, low-weight machines that produce minimal environmental effects. Yet, with over 550 employees serving 60 countries worldwide, Niftylift lacked a central place for accurate sales and service data. With information spread across shared drives, personal folders, and email chains, the company needed a CRM solution that could keep up with the increasing demands of its global business.

CRM prompts business growth

Niftylift wanted to shift its customer journey to the cloud for smoother customer interactions (like quoting) and mobile access while traveling. Niftylift decided it was time to reassess its CRM solution to better centralise data, improve process efficiency, and make smarter business decisions. Niftylift decided to move to SugarAI's cloud solution to accelerate its CRM use.

Disjointed sales data leads to slow and inaccurate quote creation

Using SugarAI helped Niftylift solve challenges around disparate data, low CRM adoption, and disjointed customer interactions. Plus, it addressed one of the key challenges for the sales team who were unable to efficiently create accurate quotes or provide updates on repeat customers, which make up 75% of the company's sales.

To ensure SugarAI was the best fit for Niftylift's needs, Sugar's team worked closely with the company's leaders to develop a strategic plan. Together, they identified goals around modernising and optimising processes. For instance, Niftylift's highly mobile sales force needed an easy and reliable way to consult and update sales data while creating professional quotes from anywhere. All quoting and pricing were previously done manually in disconnected spreadsheets, documents, and emails. This made the process difficult to update and prone to errors.

Niftylift also needed to respond to fluctuations in the market thanks to tax incentives for buying plant machinery. This encouraged customers who would normally rent or purchase second hand equipment to purchase new from Niftylift. With more leads coming in than ever, Niftylift's sales team struggled to quickly assign reps and personalise communications.

Digital transformation and best practices

SugarAI worked with Niftylift to implement CRM best practices, making it possible to transition into a fully digital business cycle, particularly around customer acquisition and retention.

Niftylift now has a custom pricing tool, optimised logistics, and a better way to build quotes. Niftylift can easily create quotes with a single process across all regions using templates in Sugar.

Industry

Manufacturing

Location

Milton Keynes, UK

Company Size

650 employees

Website

www.niftylift.com

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Sugar provides Niftylift with a 360-degree view of each client, as well as a way to automate quote creation within the platform. Niftylift can store data and customer insights in one place, making it easily available for follow up and analysis. As agents coordinate with business leaders, processes are synchronised, offering up-to-date information to the customer service team to improve the entire business cycle.

Automated sales processes improve efficiency and data quality

Today, Niftylift has a central database and standardised commercial processes, resulting in a more complete picture of the customer journey. It has operational processes that better align with the needs of the business. Plus, it has digital platforms to drive performance and be more competitive.

Automating and mobilising key sales processes has enabled Niftylift to improve its agility and impact nationwide. Since implementation, Niftylift has achieved positive impact in some sales lines, as well as a major improvement in data quality compared to the previous year.

Instead of calling or emailing sales admin staff to update customer information while on the road, Niftylift sales reps can simply input the data themselves through cloud and mobile access.

The experience has given Niftylift a blueprint for success when implementing technology.

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4,000+

Customers

1M+

Users

120+

Countries

180+

ERP
Integrations

96%

Customer
Satisfaction

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