



DataSync
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Trading Done Right with DataSync

A case study on a high growth global trading strategies firm.

Organization: Trade Angle Strategies
Website: <http://tradeangle.com>

Client Project Champion:
John V Logan – CEO

Key Points

Unified marketing message and backend systems key to success

SugarCRM provides the backbone for communication, growth and marketing

Ongoing development provided by DataSync key to Trade Angle's ongoing competitive advantage

Hosting and fast rollout made early project success possible



About the Project

The Challenge

- Previous website was unmanageable
- SugarCRM poorly implemented, Trade Angle staff had no training
- Website and CRM not integrated
- High-growth organization feeling the hard effects of poor information management
- No lead follow up, email marketing

The Solution

- Upgrade website to new look and feel, usable content management solution
- Implement CRM properly
- Integrate website and CRM
- Automate email marketing

The Result

- Highly scalable business model
- Increased sales and customer service productivity, accuracy
- Highly effective marketing
- Improved and more cohesive marketing image

Overview

Trade Angle strategies is an innovative trading strategies company dedicated to building the best tools for the investor. Trade Angle offers “the Trading and Investing Community a Powerful Selection of Solutions to Give Traders and Investors a Decisive Edge” (ref: tradeangle.com). Their products range from automated trading systems, their own proprietary signal boxes and indicators, and full-scale trading rooms. Their portfolio of products is best of breed, and continues to attract media from around the industry.

When we first met, Trade Angle was building out a portfolio of products, and was in the very early stages of launching a web presence, e-commerce package, and CRM solution to manage their clients and products. Their business model was taking off, but their information management tools were not. DataSync was brought in to first get a handle on where Trade Angle was at, build out a technology strategy, and begin implementing the most critical components.

The Challenge

The first conversation we had consisted of John's analysis that “we have all these tools, no one knows how to use them, and I'm sure we're not using any of them correctly”. This was indeed the case. Trade Angle had a website that had been built on whatever tools the founding team could find, and content was spread across a production site and a development site that hadn't been finished. Content and signup forms were spread out everywhere with not cohesive management system.

On the CRM side, SugarCRM had been installed and partially configured. However less than 10% of the package was used. A few staff did use the package, but there were no standards on how to input and maintain information.

Lastly email marketing was done through Outlook email broadcasts (BCC field anyone?). These email blasts were compiled from Excel spreadsheets daily, and there was no way to opt-out of email lists. Furthermore it was a completely manual process.

The Solution

Web Content Management

The most urgent need for Trade Angle was updating and streamlining their website. The site lacked brand consistency and didn't have an overall layout strategy. DataSync implemented Joomla, a popular open source content management system (CMS) that fit well with Trade Angle's content layout. This new system was fully implemented in less than 2 weeks, allowing Trade Angle to move forward with marketing and sales efforts. Extensive content changes were also put in place, and DataSync worked hard in this short time frame to ensure the entire rollout was a success.

SugarCRM/Lead Follow-up Rollout

Originally Trade Angle's biggest need was for training on how to use Sugar most effectively. After a few in-depth training sessions, the overall user experience improved considerably. In addition, DataSync immediately provided smaller changes to make the Sugar more usable for Trade Angle staff.

After the initial training, DataSync focused on adding automated responses to trial subscriptions for Trade Angle's prospects. DataSync was able to automate the entire response and follow up process,

freeing up internal staff to make sales calls. This upgrade also reduced errors and prevented leads from falling through the cracks.

Marketing

Email marketing was a key part of Trade Angle's future strategy. Because of SugarCRM's extensive campaign functionality, DataSync was able to help Trade Angle build target lists, create campaigns, and roll out larger scale marketing efforts. These efforts have been designed to go hand in hand with other forms of media and drive traffic to Trade Angle's website. In addition, robust response tracking has been implemented to gauge the overall success and effectiveness of marketing campaigns.

The Result

The resulting solution is a tremendous tool for Trade Angle to use as an ongoing competitive advantage in their market. This project is also ongoing, and new features and automation are already in development. DataSync has been able to provide value both on the operations and marketing automation fronts.

At DataSync we're always excited to help a high-growth, dynamic firm like Trade Angle meet goals and move forward. As Trade Angle grows we look forward to working closely with John and his staff to provide robust technology that will drive future growth and profitability.