

## IT company automates website forms with ConnectWise WordPress Plugin

### ABOUT CONSURO



Consuro is a Texas-based premier managed technology services company serving thousands of businesses from start-ups to Fortune 100 companies. Consuro provides comprehensive IT services ranging from desktop management to complex web applications.

### THEIR EXPERIENCE BEFORE USING BNG DESIGN'S CONNECTWISE WORDPRESS PLUGIN

Like many IT firms, Consuro spends their time on tasks like managing their service board, answering IT/technical questions from clients, and focusing on sales and support. In order to accomplish all these things day in and day out, Consuro needs to create automation and efficiencies in their business. One of the areas of their business that was important to create productivity, was the connection between their website and PSA.

One of the biggest struggles for the sales and marketing team at Consuro was a lack of integration between their CRM, ConnectWise, and their website platform in WordPress. Consuro chose WordPress as their website platform because it's both scalable and flexible. And Consuro chose ConnectWise as their CRM because it's the best tool to help them manage their IT company. There was a distinct disconnect, however, between the two software tools in the ability to pass data from forms on their website, to their CRM.

For instance, when prospects or customers would fill out forms on their website, the marketing team spent time manually entering data into ConnectWise. And when wanting to establish an ROI with marketing, it was difficult to link campaigns from certain forms because Gravity Forms in WordPress didn't have a way to communicate data to ConnectWise's functionality in creating opportunities, activities, or tickets.

Prior to BNG Design's plugin, their website and CRM sync process was broken. Consuro's Director of Marketing and Sales, Courtney Summers, spent hours managing data instead of managing the right tasks inside of ConnectWise. "We really desired to better leverage our tools so we could connect data within ConnectWise.

Before BNG's plugin, we couldn't do that," said Courtney Summers, Director of Marketing and Sales. "For us, it was about taking customer information and creating a way to automatically sync that information between WordPress, Gravity Forms, and ConnectWise."

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## THEIR EXPERIENCE USING BNG DESIGN'S CONNECTWISE WP PLUGIN

A few of the aspects they've experienced using BNG' plugin are:

- The sales and marketing team at Consuro now avoids manual data entry as customer data from their website forms easily sync's with ConnectWise.
- When forms are completed on the Consuro website, this triggers several convenient events such as an opportunity being created, an activity being created, and creates tickets in order to track it all in ConnectWise.
- Duplicate records are avoided, as the BNG ConnectWise WordPress plugin scans to eliminate duplicate contact records.
- BNG's plugin also allows the Consuro sales and marketing team to respond to customers and clients much faster and more consistently.

"We tried other vendors for this process, and it didn't work. It was more or less a temporary fix, that captured some data but data was broken. Other solutions, for example, created duplicate records, along with additional unnecessary information in ConnectWise. These other solutions also weren't scalable, as we grew. We also wanted to be able to measure our SEO company, through things like form and landing page conversions, along with leads, and we just couldn't do that with other so-called integrations. The experience with BNG's plugins has, for the most part, solved these problems."

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## WHY THEY WOULD RECOMMEND BNG DESIGN'S CONNECTWISE WORDPRESS INTEGRATION



"As a small team we can quickly help our customers and clients get help faster because of how the integration communicates. The BNG plugin is more than just a widget or plugin; it gives our team the ability to study customer information, which is sync'd within ConnectWise, along with helping as we manage our workflows."

**-Courtney Summers, Director of Marketing and Sales**