


Customer success story

Innovative Modular Solutions IMS




Customer

IMS



Industry

Construction



Location

United States

IMS gains the full picture with Sage

Innovative Modular Solutions (IMS) offers a complete range of value-added modular building services to the commercial construction industry.



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Andrea Brand,

Product Manager, IMS

Single view drives greater efficiency

When it came to customer information, like many other businesses, IMS relied on different ways of managing data including Excel, notes and emails. As a result, the company had no clear visibility of sales leads and were overly reliant on people who were working on the road or away from the office. With no central place for customer information, IMS needed a better way to manage sales, service and marketing functions.

Andrea Brand, Product Manager, explains what they were looking for in a new solution: *“We had to have one view - I wanted to know which source of leads were performing well and needed to be able to forecast for the year ahead”.*

Top 3 challenges experienced by the company before implementing Sage CRM:

1. No central place for customer and lead information
2. Lack of reliable reporting on key product lines
3. Limited marketing capabilities, no idea on what worked and what didn't

“We have long incubation periods for our business,” said Brand. *“There’s no way we can keep track of everything without Sage. It’s a quick way of looking at all the history, no matter how long ago it was.”* “If we turned it off tomorrow, we would have no idea on who our potential customers are – their status and more. Our business would come to a standstill.”

She said about Workflow, “Anything we enter as lead gets qualified by me and I use the workflow to allocate these leads to sales representatives, with me keeping an eye on the various stages they go through.” With a lot of repeat customers. IMS can “see the whole history” of what has been sold – however long ago that last activity took place. Overall customer experience has also greatly improved as we now “do a better job in staying in touch when they want us to be.” Improved decision-making.

Brand cited reporting as one of her favourite features. “I like the dashboards and report tool. I look at the data to see where we are coming from, what territories, what markets are working for us, so we can make a much better decisions on sales trends.”

One of the reason Sage worked so well for IMS was because it was easy to use by everyone in the business. “When we have new people start, I tell them to get in and start using it and they get it straight away,” said Brand.

IMS has evolved Sage CRM over time to suit the specific requirements of their business. This has included adding new fields, setting up custom reports and tracking more data to assist in marketing and sales forecasts. Future plans for Sage CRM “include implementing a marketing automation platform connected to Sage CRM”.