

Price TWA

Suppliers of ventilation and heating products to the construction industry:

Tailor-Made CRM for Price TWA

Price TWA was formed in 2008 following the merger of two leading heating and ventilation businesses in the UK – Price Technical and TWA. The company's vision is to be the UK's leading supplier of ventilation and heating products to the construction industry.

They needed an easy-to-use **bespoke CRM system** that would improve staff communication by providing real-time updates, reduce the number of clicks needed to obtain information and create reports for contracts at all stages of the project lifecycle.

Since they started using their new system from Evergreen, Price TWA has **halved the time it takes to add new customers or projects**. They are enjoying **better staff communication** and a greater visibility of their business through real-time reporting.

Evergreen Solution

- Documents can now be uploaded to quotes and are clickable to download or just view. Each document has a title and a short meta description to allow easy searching.
- Dual search function (by section or whole database) lists all matching contacts, companies, projects or quote records.
- All updates to the system are recorded and viewed in a timeline view (audit trail) for each staff member and real-time sales reports can be generated.
- The status of each project is displayed in a pipeline. Projects can be dragged and dropped to their new status and each action is recorded in the project's history.
- Actions for projects can be created by staff for a specific date & time. A pop-up reminder window is displayed when the action is due, and/or sends an email or text message (SMS) if this option is selected. Previous actions are shown as "history" on the project record.

Evergreen were on the same wavelength from the start.

In 2012, Price TWA invested in an off the shelf Microsoft Dynamics Customer Relationship Management (CRM) system but 2 years later their **sales and project management processes** were still heavily reliant on the use of spreadsheets. Their off the shelf software system was expensive, slow and complex and some members of the team had abandoned using it altogether, turning in favour to manual systems.

In 2014, IT & General Manager Alan Paynter sought to replace their Microsoft system with a bespoke CRM solution. An online search for Bristol software development led him to bespoke business software system specialists Evergreen. Looking at a few examples of how Evergreen had helped other companies with similar projects, Alan Paynter got in touch with Evergreen to discuss Price TWA's requirements. Says Alan, "Evergreen were very friendly and helpful. We had contacted other companies in the past but based on the initial conversation with Evergreen we knew that we had found the right company as they were on our wavelength."

A system that was easy and accessible, fast and simple.

Alan explains their needs further, "We were looking for a system which could track sales from initial proposals through to project completion. We needed more customised reporting as well as alerts/reminders when project deadlines etc. are due. We have both internal and external sales people who all need to update quotes and proposals and we needed real-time updates."

Potentially there were to be 10 users of the CRM, including specialised sales agents in the West Midlands, The North West and Scotland. The challenge for Evergreen was clear. Having found the **existing off the shelf Microsoft system to be cumbersome, speed and simplicity were the key requirements** of a customised CRM system. In their current Microsoft system they had to manually update company details within every contact for that company and enquiries were manually passed to the appropriate team member(s) to action. Proposals and quotes were then generated from this but because there was no template for doing so, proposals lacked consistency and there was a risk of vital information going astray. Proposals were attached as PDFs to the project but there was poor visibility concerning what stage each project had achieved and what tasks had been completed. There may be many quotes per project and so they were creating various versions of the original quote when re-quotes were required. Emails were recorded within projects via blind copying via a drop box interface.

Price TWA needed easier navigation, one-click options and better search options within the system, to ensure that projects could be more effectively tracked through the sales process. The interface had to be clean and simple using the company colours and logo as a contemporary, clear and neat presentation was important to them.

One of the key advantages of having a **customised CRM system** built by Evergreen is that it can be **built to suit the needs of each individual business. It addresses specific issues faced by that business and creates tailored solutions**. So what were the solutions created by Evergreen for Price TWA? The ability to create a project record for all quotes to enable them to be tracked was included in the new CRM system. In addition to this, the following features were incorporated:

- A unique login for each staff member**, secured with a password and 4-digit PIN.
- Documents can be attached (uploaded) to quotes and are clickable to either view or download**. Each document has a title and a short meta description to allow easy searching.
- A quick search facility** lists all matching contacts, companies, projects, or quote records.
- Each company can be tagged with user-defined tags, which are then searchable.
- A pipeline view shows the status of each project**. Projects can be dragged and dropped to their new status. This action is recorded in the project's history.
- A simple monetary value can be assigned to each project** plus the anticipated time frame. These are shown on a separate view for projects with a status of 'tender'.
- All updates to the system can be recorded and viewed in a **timeline view** (audit trail) for each staff member.
- Staff can create actions for projects for a specific date & time**. The system will pop-up a reminder window when the action is due, and/or send an email or text message (SMS) if optionally specified. Previous actions become "history" on the project record.

Improved team communication and reporting.

So what difference has having a bespoke CRM system meant to the business? Alan Paynter sees only positives, "The new CRM it is easy and quick to use and we have everything at our fingertips now, which has greatly improved communication within the team and the speed at which we can get information to our clients. All the team are now using the new system and we've received positive feedback, particularly from those who had stopped using the old system."

Alan continues to point out that the search feature which is included in the bespoke CRM system has is undoubtedly the one item that they could not now do without. They have two different search options, one that searches the whole database and the other that searches just within a given section. Price TWA now have **greater visibility of their business** due to improved reporting. Sales reports can now be created quickly and easily, showing, whether contracts are 'active' or 'passive' and which stages the various projects have reached.

Being a **bespoke implementation**, the new system has the potential to be added to, and developed to suit the working practices of Price TWA going forward.

Pleased with the way the bespoke CRM system has changed the way the business works for the better, Alan Paynter is already looking at additional features and functionality to add to the second phase of the CRM project, such as calendar features. "We'd like to be able to have a calendar of appointments for different people. We'd also like to make the website more responsive by having a mobile version. An app could also be a useful tool for the guys who use their phones and tablets off site."

"An easy to use product that has improved the way we work."

The system is **robust yet flexible** and has the ability in the future to develop into a fully featured back-office system that aids all staff at Price TWA to manage production, logistics, customers and suppliers in their day-to-day operations.

So what has it been like working with Evergreen? Alan Paynter has nothing but praise. "It has been very easy working with Evergreen. I am a busy person and I like just being able to hand over our requirements and what we want to achieve to experts who know what they are doing. Evergreen just got on with it. They respond very quickly and their on-going support has been excellent."

Alan Paynter concludes that although he does not currently know of any other businesses who are in the market like theirs, he would have no hesitation in recommending Evergreen in the future. Why? "Evergreen are very friendly, easy to talk to and understood our needs and aims straight away. They produced an easy to use product that has improved the way we work and given us greater visibility of our business."

Click here to visit
www.pricetwa.co.uk



“

Evergreen are very friendly, easy to talk to and understood our needs and aims straight away. They produced an easy to use product that has improved the way we work and given us greater visibility of our business.

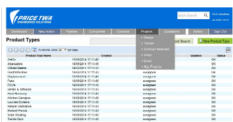
Alan Paynter, IT & General Manager
Price TWA



“

We were looking for a system which could track sales from initial proposals through to project completion. We needed more customised reporting as well as reminders when project deadlines etc. are due. We have both internal and external sales people who all need to update quotes and proposals and we needed real-time updates.

Alan Paynter, IT & General Manager
Price TWA



“

It has been very easy working with Evergreen. I am a busy person and I like just being able to hand over our requirements and what we want to achieve to experts who know what they are doing. Evergreen just got on with it. They respond very quickly and their on-going support has been excellent.

Alan Paynter, IT & General Manager
Price TWA

