sage

Sage CRM and Sage 300 ERP enables Boxwood to succeed

BOXWOOD
works where it matters

Customer
Boxwood Group

Industry
Consultantcy

Location
United States

Solution
Sage CRM and Sage 300 ERP

Boxwood Group is a consultancy dedicated to improving business performance by introducing and embedding operational excellence. They do this through the provision of a number of management, recruitment and training services to their client base.

This entails a combination of strategic and process consultation; recruitment for key positions; training and education for existing staff; and selection and recommendation of technologies to improve efficiency.

This is a complex product set to manage for the company and prompted the need for a customer relationship management (CRM) system to handle it. In addition to handling the complexity of relationships with their existing client base, Boxwood needed a system to help with their own needs in business development and marketing in general and to develop leads for their services.

David Cook, Head of IT at Boxwood Group explained "What we needed was something more than contact management, more than off-theshelf SFA (Sales Force Automation), or a simplistic electronic marketing tool. Sage CRM and Sage 300 ERP provided us with a solution that had extensive functionality, was easy to implement and all at a cost that was realistic. In terms of a fit for us it is ideal."

Selecting Sage CRM and Sage 300 ERP
Boxwood Group had reached an interesting stage of their development. After four years they realised that existing systems were not going to scale with the size and ambition of the company. Positive word-of-mouth led Boxwood to evaluate Sage CRM and Sage 300 ERP as a possible solution for their contact management, business development, marketing, recruitment and training course needs.

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David Cook,
Head of IT
Boxwood Group

Challenge
- To implement a cost-effective CRM solution in a mid-sized organisation, scaling to a current maximum of 75 users.

- To customise this solution to embrace recruitment and training divisions as well as implement marketing and sales functionality.

Solution
Sage CRM and Sage 300 ERP was chosen as Boxwood had the basic functionality it needed, and Sage CRM and Sage 300 ERP could be customised to meet the company's specific needs and processes.

Results
Sage CRM and Sage 300 ERP was implemented and customised within four weeks getting their four very diverse user groups on the system – marketing, business development, recruitment and training. With one single source for all prospect and client information all customer information is shared across the company. Sage CRM and Sage 300 ERP also enables sales team to more effectively manage and analyse the forecasting and sales pipeline.

> "The support we've received from Sage Software and our business partner has been prompt and helpful. We've been able to grow with the software in many ways."

Roberta Robert
Webster Five
Payroll Administrator

The company required a lot of the standard functionality that Sage CRM and Sage 300 ERP provides, in particular for its sales and marketing teams. But in order to match the needs of the company exactly, David Cook knew that the solution would need to be customised to meet their exact needs.

"The fit that we were looking for fell into the category of the 80/20 rule - 80 per cent standard, 20 per cent we would have to customise ourselves. But, having been involved in numerous technology implementations both here and with clients, that 20 per cent can be difficult to achieve, critical as it is for the ultimate success of the project."

Like any CRM implementation, there had to be considerable corporate buy-in for the project, and some changes in the business development processes and other tweaks to how the business is run within Boxwood in order to make the company's activities more effective. What the company could not afford was to develop a situation where the technology did not map these processes to the letter and occasioned technology-led and not business-led process changes.

The key determining factor for Boxwood then was the "Entity Wizard" available from Sage CRM. The Entity Wizard allows new fields, functions and pages to be built in Sage CRM and Sage 300 ERP and populated throughout the solution automatically and rapidly.

As David Cook says, "this tool allowed us to quickly build a customised solution for Boxwood. I did not expect that in the four weeks allotted to the implementation of the solution, including integrating it with MS Exchange and MS Office XP that we would be able to go as far as we did in incorporating and now running our four very diverse user groups on the system – marketing, business development, recruitment and training."

The solution and what it delivers

All users access the Sage CRM and Sage 300 ERP through a browser. Sage CRM and Sage 300 ERP takes care of all client and contact information whilst also providing the specific screens and functionality for the recruitment (search and select), marketing, business development and training.

The system allows the company to:

- Maintain a single source of data for all company activities
- Drive and report on Marketing Campaigns
- Analyse Marketing Campaign Results and activity
- Provide visibility of the sales pipeline across the company
- Provide forecasting and analysis of business development activity
- Provide visibility of all client activity in a single source

Reflection and the next stages

The introduction, implementation and go-live at Boxwood was by any standards a smooth process. David Cook puts this down to two things – technology choice and planning – "We put our own advice into good practice – we defined what we wanted and planned how to get to it. However, this could have been easily sent off course with the wrong software selection. Sage CRM and Sage 300 ERP has proven to be the perfect middle market solution for us – deep enough to match our unique processes, functional enough to deliver the tools we need to do better business, and straightforward enough to provide a timely, and cost-effective implementation process."

The benefits already accrued have been considerable:

- Informed sales force aware of all communications that have taken place with prospects and clients
- Targeted marketing campaigns resulting in a more appropriate pipeline and better return on investment
- Reduced response times for search and selection candidates
- Improved customer service for training course delegates

David Cook says, "Sage CRM and Sage 300 ERP has already delivered fantastic results and we're actively exploring how we can develop this further in the future."

About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Accelerate your business success with a free 30-day trial at www.sagecrm.com

Sage CRM