

# Distribuidora Joan unifies its management processes with Sage CRM



## Customer

Distribuidora Joan

## Industry

Hospitality

## Location

Spain

## Solution

Sage CRM and Sage ERP

## Background story

Distribuidora Joan is a Catalan company dedicated to the manufacture and distribution of products and fittings for the hospitality industry. The company started out as a distributor over 30 years ago, but later developed its business with the integration of other organisations and diversification.

Today, Distribuidora Joan is one of the sector's leading companies operating as a logistics warehouse and exclusive distributor of major international brands. The company, which also supplies chemical and cleaning products, also manufactures its own brands, which are sold throughout Spain, Andorra, Portugal, Italy and France.

"We have always opted for the upper end of the market, which we offer to our clients at a very competitive price, thanks to our high turnover and our considerable procurement power and storage capacity," said David González, Manager of the firm.

The organisation's headquarters are located in Sant Fruitós de Bages in Barcelona, where Distribuidora Joan has a finished product warehouse spanning over 10,000m<sup>2</sup>.

The firm also has another two sites in Catalonia and the Basque Country, and serves the entire Iberian Peninsula either directly or through a network of specialised representatives. With a team of 75 professionals, it tends to 3000 clients and has an annual turnover of 18 million euros.

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## Challenge

Distribuidora Joan wanted to achieve better stock control in order to optimise procurement and to better manage production orders. It needed better visibility across the whole business with monitoring of the sales force, clients, campaigns and results.

## Solution

Sage CRM was deployed by Distribuidora Joan in 2011, to control the commercial area along with an integrated e-commerce solution used for online orders.

## Results

Distribuidora Joan now has access to real-time data which has been a huge benefit in terms of the decision-making process. It now has an optimum stock control system for each business area along with more efficient procurement, selling and dispatching processes.

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### Room for change

In terms of management, Distribuidora Joan's main requirements relate to three points of interest: achieving good stock control to optimise its maximum purchases and orders placed by the suppliers; ensuring the adequate control of production orders for optimal plant organisation; and the adequate management of the commercial area, with detailed monitoring of its sales force, clients, campaigns and results.

The company, whose management team has always opted for new technologies, relied on local IT service provider and Sage Business Partner Sistemes d'Organització from the outset. For 17 years now, this service provider has recommended the Sage business management solutions, which have been used in the headquarters and, over time, in the different organisations Distribuidora Joan has acquired, creating a unique platform for the control of all of its business processes.

“In information systems, for us it has always been very important to use the very latest cutting-edge technology,” explains David González. The organisation used older Sage platforms up until 2011 which was when Sistemes d'Organització presented the new Sage CRM suite. “We saw that this latest solution incorporated new features that would benefit us. We can see functional improvements in different areas like finance and accounting, and a significant advance in the visual environment, user-friendliness and performance,” said González.

### The implementation phase

Sage CRM was set up at Distribuidora Joan at the start of 2012 as part of an integrated solution with Sage ERP. The adaptation, data migration and implementation of the platform were carried out by Sistemes d'Organització. Today, this IT services company also focuses on the foundation and development of the company's management systems, while handling the rest of its ICT and communications infrastructures.

“Everything was perfect during the migration to Sage CRM”, explains the manager of Distribuidora Joan. “In our previous solution, Sage Logic Class, over time many customisations had been introduced and we were afraid of losing them, but they were all

seamlessly transferred across to Sage ERP. Also, our employees were already used to working with Sage and the transition to Sage CRM did not bring any major changes for them, aside from the improvements gained”.

Sage CRM is now fully operational and is used by some 22 professionals in the areas of administration, procurement and sales, finance, production and warehousing. Among the main adaptations incorporated into the suite are those related to work with hotel chains, they were able to create an additional database for these hotels with the specific requirements of each client, which are used during manufacturing, “to quickly customise consumables such as napkins, etc. with each customer's identity,” said David González.

### Reaping the benefits

One of the main benefits achieved with the migration to Sage CRM, has been decision-making, thanks to the solution's new Analysis Centre. “The module is very easy to operate, which enables us to obtain business-related information very quickly (procurement, sales, etc.) Managers no longer have to request reports, we access the information ourselves, which has made the Analysis Centre one of the program's most valued new features,” said David González. The new dashboards in the different Sage CRM modules were another important improvement for the management team and area managers. These dashboards allow a user-friendly graphic display to be created for the control of each business area.

Distribuidora Joan's administrative management was made easier with Sage ERP's new capabilities in terms of accounting, tax management and invoicing. “We work with over 3000 clients and manage a very high volume of invoices which is impossible to control without a computer program like Sage ERP”, says the company's Manager. “The solution allows us to manage this entire problem swiftly and appropriately, covering all our needs”.

With the new Sage CRM, Distribuidora Joan also controls various warehouses, managed by location. “Thanks to Sage CRM, we know which warehouse and on which shelf to find each product, we manage a high number of product

‘Thanks to Sage CRM, we know which warehouse and on which shelf to find each product, we manage a high number of product references and can easily locate each item, wherever they are’

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references and can easily locate each item, wherever they are,” explains David González.

#### A solution with a difference

Sage CRM solution was implemented within the organisation to speed up management of its sales force, visits and interactions with clients. This has been a huge benefit to Distribuidora Joan. It has 22 licences for this tool, which are used by both the salespeople themselves and the back office professionals who support them.

“Sage CRM has helped us to better control our clients, who are segmented by type,” Xavier Oller, Sales Director at Distribuidora Joan, “the solution also facilitates the control of business opportunities, generated by product group or supplier”.

Since autumn 2013, the tool has also been applied in marketing for the generation and launching of campaigns by product group and client. “We hope that Sage CRM will also soon support new client acquisition actions, as well as results analysis and decision making on the basis of these,” said Oller.

The e-commerce solution facilitates the business with clients who specify their need for an online order placing facility, with the corresponding verification of availability, reservation of items, etc.

This solution has also been customised so that although each individual member of a chain places its own orders, additional authorisation is required from its central body before it can go into production.

“Having an ERP solution integrated with the CRM and E-commerce platforms, is key to our organisation’s competitiveness,” said David González.

“Anything that accelerates the procurement, selling and dispatching processes is a boost to the business. Sage is what we need, in terms of functionality, power, process automation and reliability of information, which is why we are satisfied with the solution”.

The work that Sistemes d’Organització carries out is also becoming more and more crucial in ensuring this satisfaction. “It provides us with excellent IT support. Whenever we have needed an adaptation, they have been very accommodating, understanding exactly what our business needed, and

incorporating it into the solution, which put our minds at rest,” said the Manager of Distribuidora Joan.

#### Advantages

- Improvements in accessing data and the decision-making process
- Customised dashboards for the control of each business area
- Swift invoicing management, which covers all of the company’s needs
- Easy location of items and optimal stock management by multiple warehouses
- Improvements in the division and monitoring of clients and sales opportunities
- More efficient procurement, selling and dispatching processes

## 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](http://www.sagecrm.com)

