

# DWD International gain greater visibility with Sage CRM



## Customer

DWD International

## Industry

Manufacturing

## Location

Texas, USA

## Solution

Sage CRM

## Background story

DWD International designs, manufactures, installs and maintains HVAC systems for the oil and gas industry. Built to withstand the most challenging conditions, its products are used on offshore platforms and rigs, in refineries and chemical plants. The company's systems can be found at diverse locations around the world, from production facilities in Alaska to platforms off the Gulf Coast, to living quarters in Southeast Asia. Customers include BP, Chevron, ExxonMobil and Shell.

DWD needed to add structure and workflow to its sales and service departments to support a fast-growing customer base that expects premium service, regardless of the inaccessibility of their remote sites. Relying on Excel spreadsheets, not just for sales but for tracking a growing service business, was time consuming and inefficient.

Better visibility was needed of its activities to stay closer to customers and identify new opportunities. "I knew it was time to follow through and get a CRM system to help us better serve our customers," said Gerald Scott, President of DWD International.

Moreover, there are certain things that we really need to track such as 'Equipment & Projects' that most CRM's simply can't accommodate.

'Sage CRM makes easy work of profiling and managing information about the information that was important to us'

Gerald Scott  
President  
DWD International

## Challenge

Staying on top of sales and service support was proving to be a challenge for DWD International, a fast-growing company with an international customer base in the oil and gas industry.

## Solution

Sage CRM supports a highly distributed workforce without the hassle of on-premise investments and offers features and functionality far beyond traditional sales pipeline management.

## Results

DWD International has leveraged Sage CRM, not just to improve its sales processes, but to ramp up its support and maintenance capability and gain better visibility of its customers' businesses.

‘The follow through since implementation is really making a difference to the business. We are well on our way with Sage CRM which has been, and will continue to be, an excellent investment for DWD giving an incredible return.’

Gerald Scott  
President  
DWD International

#### Key to success

As a satisfied customer of Sage 100, Sage CRM was always a likely candidate when DWD took the decision to deploy a CRM solution. With minimal internal IT resources and a reluctance to take on the management and maintenance responsibilities of running on-premise software, the decision was taken to go with Sage CRM.

Hosted by Sage and available with free upgrades and security as part of the subscription service, Sage CRM allowed DWD to invest in CRM as an operational rather than capital cost. Crucial to the arrangement was the Sage Business Partner, Dan Cousins & Associates, who would play a key role in customizing the features and functionality.

Like many Sage CRM implementations, a primary function was to support sales using the Sage workflow engine to tightly control the pipeline and process orders as they came through. As well as manufacturing and selling HVAC systems, however, DWD also operates a significant services business, supporting onsite customer deployments. Maintenance jobs can be anywhere in the world, including on and offshore rigs. The plan was for Sage CRM Cloud to support this worldwide activity as well as sales.

Using Sage CRM’s flexible builder feature, Dan Cousins was able to configure Sage CRM to manage a whole series of DWD processes. These include collating platform profiles – the sites where the HVAC systems are installed – recording projects related to the platform and providing an asset list of all the equipment used.

“Every company needs to manage something out of the scope of normal CRM, whether it’s assets or project management,” said Cousins. Change to “Sage CRM’s ground breaking Builder tool makes it easy to create customizations in just a few minutes”

DWD began by using it in a test environment before moving it into full production. Today, service jobs and records are linked to the equipment for a comprehensive overview of a highly distributed business. “Going into this process I did not fully appreciate how flexible Sage would be but Dan has been able to set it up in a way that makes a lot of sense for us,” said Scott.

#### Bring about change

With Sage CRM Cloud, DWD International has greater visibility of its sales pipeline and is better able to support its after sales customer service and maintenance business. Detailed records of all interactions are easily accessed in the system, providing a strong foundation for further growth as more of its products find their way onto customer sites.

Sage CRM Builder has become a powerful tool for the business. In the cloud and accessible from anywhere, it enables DWD field engineers to go online to see if other assets need to be checked while on site. This is a huge benefit in a business where a customer site might be an offshore oilrig that’s difficult to visit.

Sage CRM Cloud has successfully added structure to processes and provided much better visibility of sales and service operations. Sage workflow imposes a process on sales; Sage Builder collates detailed records for much greater scrutiny; and the CRM dashboard brings it all to the surface for management to see.

Overall, DWD is in a much better place to continue on its growth trajectory. “The follow through since implementation is really making a difference to the business,” said Scott. “We are well on our way with Sage CRM which has been, and will continue to be, an excellent investment for DWD giving an incredible return.”

## 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)

