

Federated Farmers uses Sage CRM to help manage its 18,000 members



Customer

Federated Farmers of New Zealand

Industry

Membership organization

Location

Niantic, Connecticut

Solution

Sage CRM and Sage 300 ERP

Background

Federated Farmers provide a range of services and a powerful lobbying voice for 18,000 member farmers and rural families throughout New Zealand. A network of 75 employees and hundreds of volunteer staff, grouped into 24 provinces, are supported by the Wellington-based head office and the main administration centre in Hamilton. In addition, seven industry groups focus on specific sectors such as dairy, meat and fibre, grain and bees.

Member services

As a voluntary, member-centric and member-funded organization, it is imperative that Federated Farmers closely monitors and balances the needs of its members. This required a centralized view of all member transactions, communications and payments, rich reporting functionality and the ability to tailor services.

In 2006, it implemented Sage CRM to integrate with their Sage 300 ERP system to handle subscriptions, invoicing and help manage their membership base. Recently, the organization needed to re-engineering its billing processes and introduce a new pro forma billing model.

One of the biggest challenges for Federated Farmers recently has been the downturn in the economy, and it has been used Sage CRM for marketing and lead management and hired Recruiters to promote the Federation to prospective members. Leads are recorded remotely by the Recruiters and actions assigned to the Membership team to action internally.

Challenge

Federated Farmers realized it needed to implement a CRM solution that would integrate with its Sage 300 ERP and enable it to manage membership renewals and assist with the daily management of membership queries.

Solution

Sage CRM was implemented and integrated with their Sage 300 ERP system to handle subscriptions, invoicing and help manage its membership base.

Results

Renewals are automatically generated based on the members' financial status and renewal date. Orders are produced and invoices matched against receipts when received in one process.

On top of the efficiency gains, with the newly revamped and integrated system, Federated Farmers now have much richer insight into their finances at any point in time.

‘The integration of our systems has been fundamental as previously there was a lot of manual data entry. Now that the process has been automated, there’s no room for data entry error or forgetting to go into Sage CRM to update it.’

Gillian Bright,
Federated Farmers

Upgrade

Federated Farmers upgraded its ERP and Sage CRM tools so the billing process could be re-engineered. It sent out about 12,600 invoices in January. One of the reasons for the upgrade and the re-engineering process was so it could change to a system of pro forma invoicing to tidy up its balance sheet. After upgrading the ERP and CRM systems, it implemented a new module in the ERP that raises a pro forma invoice.

Understanding was key

Federated Farmers chose to partner with Endeavour, an Sage re-seller, to manage the project. Endeavour demonstrated its understanding of the accounting cycle and the accounting processes that needed to be implemented.

To eliminate manual data entry and automate the necessary business processes, Federated Farmers prioritized greater integration of its core systems. The new integration runs processes that updates Sage CRM at the same time the data is entered into the ERP system, and vice versa.

“The integration of our systems has been fundamental as previously there was a lot of manual data entry. Now that the process has been automated, there’s no room for data entry error or forgetting to go into Sage CRM to update it. The system automatically runs processes that update Sage CRM at the same time the data is entered into Sage 300 ERP and vice versa,” said Gillian Bright, Federated Farmers.

Sage CRM drives the majority of the Federated Farmers operations, recording membership details, billing information, along with regional and statistical information. It is used by 50 staff throughout New Zealand. These staff record and distribute member information, and they record interactions between staff and members.

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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

