

# Sage CRM provides Gressco with the tools they need to grow their business



## Customer

Gressco Ltd

## Industry

Distribution

## Location

United States

## Solution

Sage CRM

## Background

From colourful, imaginative children's furniture, to the functionality of a classic library display, Gressco Ltd. provides the specialized products that make learning and play spaces inviting, interactive, and long lasting. The company's customers in the commercial, healthcare, school, and library markets have come to rely on Gressco not only for its unique and well-constructed products, but also for exceptionally high levels of service. Sage CRM is working behind the scenes to furnish Gressco's sales, marketing, and customer service teams with the tools they need to continue to grow both its business and its service levels.

## Integration to accumulate

As the company grew, its largely manual systems for handling marketing tasks, sales opportunities, and customer service were no longer sufficient. Christopher Krumm, CPA, Gressco's

vice president of finance, led the search for a comprehensive customer relationship management (CRM) solution. "We had recently implemented Sage 300 ERP, and so naturally we looked closely at Sage CRM which integrates seamlessly with it," he says. "We ultimately selected Sage CRM, but its integration with Sage 300 ERP was just one of the many reasons for our choice."

Gressco's top priority was finding a CRM solution that could streamline, automate, and improve all aspects of its marketing, sales, and support activities. "We looked at several CRM applications, including Microsoft Dynamics CRM® and GoldMine®, but Sage CRM was the clear winner based on its functionality, flexibility, and ease of customization," says Krumm. "The fact that it is tightly integrated with Sage 300 ERP is a great bonus."

## Challenge

Gressco's largely manual and disconnected systems for handling marketing communications, opportunity tracking, and customer support were no longer adequate as the company grew. It recognized the need for a comprehensive, centralized CRM solution.

## Solution

Sage CRM was selected for its broad functionality and flexibility to address marketing, sales, and support challenges and for its integration with the company's ERP solution.

## Results

Through targeted marketing, the company is able to tailor its catalogue mailings to the desired audience, saving money and improving campaign results. Customer service levels and response time have improved. Opportunities are now tracked from initial communication, increasing the win ratio. Seamless integration with Sage 300 ERP eliminates duplicate data entry and provides sales and marketing teams with a complete picture of the customer relationship.

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Vice President of Finance  
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#### Targeted marketing gets results

With prospects and customers in several distinct marketplaces, the company is wise to target its marketing efforts to the unique needs of each, varying its messaging depending on factors including the industry, job role, and geographic location of its prospects.

“Sage CRM is an ideal tool to help us accomplish this type of highly targeted marketing communication,” says Krumm. “We have nearly 100,000 prospects and contacts, and with Sage CRM we are able send a specific catalogue to all paediatric coordinators in hospitals in the Midwest, for example.”

Printed catalogues are costly to produce and mail, so sending the right communication to the right prospects and customers saves the company a significant amount of money and results in a much better return on its marketing investment.

Each catalogue references a tracking code, so when a customer places an order, it can be credited to a specific campaign. “We learn which kinds of mailings and what frequency works best for each of our customers in this way,” says Krumm. “We can give them more of what they want, and less of what they don’t want.”

Another way Gressco is using Sage CRM to fortify its marketing efforts is to identify customers who have not purchased in a specified period of time and call them or send them a special promotion. “This type of targeted communication is incredibly easy to accomplish in Sage CRM, and would be very difficult to do without it,” says Krumm.

#### Commitment to service

The company’s strong commitment to service led it to appoint one individual whose responsibility it was to track and monitor every support case. “She would record each case in a binder, along with all the notes and conversations with the customer. It worked really well for us—until it didn’t,” says Krumm. “We grew too big to do business this way any longer. We recognized that we needed to share this information among all our staff. Everyone here is responsible for customer satisfaction, so we need to empower them with the tools to create satisfied customers.”

Now, when a support call is received, a case is opened in Sage CRM and tracked through to resolution. Returns and replacement shipments are all initiated in Sage CRM, with the data flowing into the accounting software for fulfilment. “It’s a closed loop with no more room for oversight,” says Krumm. “And at any time we all know what cases are open, what the issue is, and what activity is taking place.”

A favourite feature among all Sage CRM users at Gressco is the interactive dashboard. “We can set up multiple dashboards, each giving the user the precise information they need, in an engaging, graphical way,” says Krumm. “For example, we have a dashboard that shows open quotes, open orders, past due invoices, last communication date, open support cases, and details of the support cases. It’s a fast, efficient way to work.”

#### Improving opportunity tracking

Previously, prospect data was often lost, simply because there was no place to hold it. With Sage CRM, prospects can now be tracked throughout the customer lifecycle. “We generate quotes in Sage CRM and when we get the sale, we convert the quote to an order and it travels over to Sage 300 ERP automatically,” explains Krumm.

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When catalogue requests are received, the prospects' information is added to Sage CRM, which then triggers a new workflow of tasks and notifications. One alert reminds staff to print shipping labels for the week's requests, straight from Sage CRM. Another alert notifies the sales staff when delivery confirmation for the catalogue is received, so they can follow up with the prospect in a timely fashion.

#### Empowering teams

While Gressco selected Sage CRM purely on its features and functionality, the tight integration with Sage 300 ERP has proven to be extremely beneficial to the company. “Before we had to give our sales and marketing personnel access to the accounting system so they could gather a complete picture of our customers,” says Krumm. “Now, customer data is synchronized between the two applications, and our sales and marketing teams can operate entirely in Sage CRM while still being able to view open orders, invoices, and other critical customer information coming from accounting.”

#### A higher level of service

“There is no doubt that we are able to offer our customers a higher level of service thanks to Sage CRM,” concludes Krumm. “The whole company is able to work together as a team to give our customers an exceptional experience. We are able to offer higher service levels to more customers with fewer people. That's a win for everyone.”

## 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)

