

# Sage CRM helps J. Coates increase sales



## Customer

J. Coates Limited

## Industry

Transport & Distribution

## Location

United Kingdom

## Solution

Sage CRM

The J.Coates Group, with the help of one of Sage's business partners, Concentrix deployed Sage CRM because it wanted more efficient sales processes. Andrew Burne, Sales Director for J. Coates explains, computer based system for some time, when we decided to move offices we took the opportunity to implement a CRM system as well. We put our trust in Concentrix to come up with a solution that would best suit our organization."

Concentrix have a number of experienced consultants who recommend a solution and then helped to implement and maintain that solution. Roger Peacock, Sales Manager with Concentrix said, "We reviewed a number of CRM systems for the J. Coates Group but Sage CRM was the only system that could deliver real business benefits and superior service in all key areas of sales, marketing and customer care."

To properly assess J.Coates requirements, Concentrix worked with J.Coates employees to gain a better understanding of their business and how they would want the system to operate moving forward. This is then documented and forms the basis of the design. Burne said "It was essential that you have clear objectives of what you would like to achieve for a CRM system, then you can draw up a wish list that will best suit you."

## Challenge

Constrained by a paper based business system that simply couldn't keep pace with the company's rapid growth. The system was prone to leakage, it was difficult to access client information, and it didn't provide integration between the company's sales, marketing and customer service teams.

## Solution

Sage CRM was selected as it was easy-to-use, intuitive, well designed and it was flexible enough to automate the company's preferred business processes. It provided the tools to manage and analyze all current and historical account details, enabling the sales team to easily identify new leads.

## Results

Sage CRM provides visibility of sales pipelines at each stage of the business sales cycle, ensuring that all information is shared across the company. It manages and measures sales forecasts in real-time, as well as enabling management to add their own assessments to the forecast. It is used to trigger call-backs, followup appointments, track daily tasks for all sales staff, schedule training, and manage available resources.

‘We are very happy with Sage CRM. It has made a world of difference to the way we run business. We have a full view of all sales opportunities and looking at last quarter results we have seen an increase in profits. I would credit most of this increase to the deployment of Sage CRM.’

Andrew Burne,  
Sales Director,  
J.Coates

The J. Coates Group’s guiding principles for its new CRM solution were as follows:

- Move to completely automated computerized system
- Increase the knowledge of customers
- Increase the effectiveness of the sales team
- Improve resource management
- Build lasting client relationships through excellent customer service

#### Why Sage CRM was selected

J.Coates selected Sage CRM, as it was easy-to-use, intuitive and well designed. It found Sage CRM to be flexible enough to automate their preferred business processes. Burne said “We were looking for a system that could do more than just hold customer contact information, but also one that could add value to the business, and maximize each customer interaction.”

Another key-determining factor in the selection process for J.Coates was Sage CRM’s sales force automation. Sage CRM provided J.Coates with the tools to manage and analyze all current and historical account details, enabling their sales team to easily identify new leads. Burne said “There was a real bottleneck in identifying who was assigned to which lead [and] also [with] checking the availability of our sales team to deal with these leads.”

#### Benefits of Sage CRM

J.Coates has a sales process of variable lengths, covering three main areas of business. These include: training for lorry drivers (LGV & HGV); Relief Driver Service and Warehousing; and Distribution and Haulage.

Sage provides visibility of all three sales pipelines at each stage of the business sales cycle, ensuring that all information is shared to the appropriate personnel across the company. Sage CRM manages and measures sales forecasts in real-time, as well as enabling J. Coates management to add their own assessments to the forecast.

Sage CRM is used to trigger call-backs, follow-up appointments, track daily tasks for all sales staff, schedule training, and manage available resources. “We needed a system that

would track all interactions within the sales cycle from start to finish. With Sage CRM one can see past and current interactions that occurred throughout a sale. There is also an opportunity to cross-sell and up-sell where appropriate.”

J. Coates takes advantage of valuable customer information that it has within Sage CRM. It allows it target and gain further reach with clients. Using Sage CRM, J.Coates plans and designs marketing campaigns. All marketing campaigns are set up within Sage CRM, Burne commented “Our marketing team is now beginning to see the benefits of running all campaigns from one system. We are executing more effective marketing initiatives across all our sales channels, as well as building campaigns to our existing client base.” Sage CRM has assisted J.Coates to deliver superior customer service. Staff have access to the most up-to-date and complete customer data. And having access to training schedules, staff timetables and warehousing availability helps staffs resolve customer queries.

J.Coates is also planning on deploying Sage CRM in their other offices, located in Coventry, Northampton and Birmingham.

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

