

McKeil Marine sees a 15% increase in productivity with the help of Sage CRM



Customer

McKeil Marine

Industry

Marine Services

Location

Canada

Solution

Sage CRM

Background story

McKeil Marine has been delivering innovative marine solutions via its fleet of tugs and barges for nearly sixty years. A family business, headquartered in Hamilton, Ontario, and with offices in Montreal, Quebec, Saint John, New Brunswick and St. John's, Newfoundland, the company runs a fleet of more than fifty vessels, supporting a variety of transportation needs along Great Lakes -St Lawrence Seaway and throughout Eastern Canada.

McKeil Marine is continually striving to improve the service experience it offers. It was being hampered however by the cumbersome way data was managed in the business. "Being spread over a number of offices, states Brent Kinnaird, Marketing Manager, "meant it was hard to centralise, capture and maintain consistency of data. It was difficult to really 'know the information' owned by the company".

All McKeil's customer data was held in Excel spreadsheets, with its six sales people spending a minimum of 4 hours each a week updating and generating sales reports. That's 24 hours a week or three working days just so that the Business Development Vice President could know what was going on.

Challenge

Continually striving to improve the service experience it offers, McKeil Marine was being hampered however by the cumbersome way data was managed in the business.

Solution

McKeil Marine chose Sage CRM to manage and centralize its customers and sales opportunities. Processes have been automated, simplifying the management of their fleet and maximizing its efficiency.

Results

Sales reporting data has been standardized and streamlined giving better visibility into pipeline and activity management while overall productivity has been increased by 15% , with savings of 1.5 hours per day per employee.

“We can look at system and see ‘we had X opportunities to carry cargo’ but we didn’t have assets available. Now we use that current & historical data to ‘put all bits of the business together’ - the data becomes intelligence”

Brent Kinnaird
Marketing Manager
McKeil Marine

In addition the Business Development VP was unable to track sales data from a single location and couldn’t generate real time reports. Unable to see the pipeline or generate a sales forecast, the sales manager was also spending between 5 and 8 hours a week creating manual sales reports for the board.

Unable to view accounting data, or view customers history or statistics, salespeople were also losing sales opportunities and money as there was no way to understand or visualize what was going on across the business. “We had inklings that business was being lost due to a lack of capacity”, stated Brent, “but when you need to invest many hundreds of thousands of dollars in new equipment, you need to be sure about your data. We had to have meaningful and compelling data to prove a business case.”

Good time for a change

McKeil Marine chose Sage CRM to manage and centralize its customers and sales opportunities. Processes have been automated, simplifying the management of their fleet and maximizing its efficiency, and everyone that needs it now has access to opportunity information. With the implementation of sales force automation, past and current sales can easily be tracked, increasing the team’s ability to make the most of any and all sales opportunities.

Sales reports are now automatically generated, and tailored to the needs of different people depending on what they need to know. Weekly reports are now sent out with no need for human intervention as email attachments, ensuring that everyone knows what’s going on all the time.

In addition the team now has an interactive map generated from the data within Sage CRM. This map provides a visual representation of where each vessel in McKeil’s fleet is and what it is doing, making it possible to contact customers who would previously have been lost opportunities and offer them vessel capacity to meet their requirements.

Key benefits

McKeil’s has seen huge benefits since the system went live. The time sales people used to spend preparing reports has now been reclaimed for more productive work. The reports generated by Sage CRM now deliver accurate and timely information to

everyone in the business. They are also generating increased revenues, as customer’s requirements and the fleet’s availability can be matched up far more accurately using the visual map. “We can look at system and see ‘we had X opportunities to carry cargo’ but we didn’t have assets available. Now we use that current & historical data to “put all bits of business together” - the data becomes intelligence”, said Brent.

Key project goals delivered

- Pipeline and forecasting information is available to everyone and easy for them to use
- Spreadsheets and manual processes have been eliminated
- Productivity has been increased by 15% , with savings of 1.5 hours per day per employee for 6 team members in only 3 months
- The sales team now has centralized access to a consistent data source
- Sales reporting has been standardized and streamlined giving better visibility into pipeline and activity management
- Pipeline data is now truly owned by the company

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

