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Sage 300 ERP delivers a clear business direction for Nexus Solutions

NEXUS

Customer
Nexus Solutions

Industry
IT

Location
United States

Solution
Sage CRM and Sage 300 ERP

Established in 2001, Nexus Solutions Limited strived to be one of the leading network solutions providers in Hong Kong, delivering total solutions with integrated network communication, infrastructure and internet security technologies to customers in Hong Kong, China, Taiwan and other Asian countries. Due to its rapid growth, Nexus Solutions intended to systemize the various data sources and deliver better coordination amongst departments, thereby defining a clear business direction for the Company.

"With the implementation of a CRM system, we are hoping to enhance the departments transparency and also to better monitor our relationship with customers and partners," Astley Yip, Sales Manager of Nexus Solutions Limited.

"Ultimately, we strive to devise campaigns that boost both sales and the the company reputation."

The challenge

Operating in the highly competitive IT industry, Nexus Solutions aimed to systemize its data and information, providing a platform for rapid customer acquisition and retention. Prior to the CRM (Customer Relationship Management) implementation, the company's data was managed in a disorganised fashion where the business cycle was difficult to measure as each salesperson had their own style of handling business leads. Moreover, coordination between the working stations was rare, resulting in the launch of campaigns which had different objectives, consequently conveying ambiguous messages to its customers and partners.

Challenge

Nexus Solutions needed to better monitor and manage relationships with their customers and partners. Without a CRM system, there was a lack of understanding of customer information and co-ordination between departments was rare. This resulted in marketing campaigns which conveyed ambiguous messages to its customers and partners.

Solution

Sage CRM was chosen to enable Nexus to better understand their customers' needs and heighten the transparency of the sales cycle and also to improve the relationship with the MNC (Multinational Corporations) partners.

Results

Thanks to Sage CRM, Nexus Solutions has a centralised bank of customer and partner information. Customer service can respond to our customer queries in a more quick and efficient manner.

'All communications between prospects and clients are recorded in the CRM and the results started to surface soon after the implementation; the loss of customers reduced greatly and our marketing efforts achieved a much higher response to our surprise.'

Astley Yip,
Sales Manager,
Nexus Solutions Limited

Yip further explained, "It is imperative that we implement a CRM system. Not only would the CRM help us to better understand our customers' needs and heighten the transparency of sales cycle, it would also showcase our relationship with our MNC (Multi-national Corporations) partners, from whom we rely on to provide quality solutions to our clients."

In addition, being a customer-centric solution provider, it was important for the consultants and support staff to register the issues and concerns of the customers to facilitate the investigation and follow up process.

A web-based CRM solution

With the help of Sage business partner Dataworld, Nexus Solutions evaluated various CRM systems and opted for Sage 300 ERP with Sage CRM. One function that stood out from the rest – the web-based feature. "Most CRM systems have similar features and functions; however, the feature that attracted our attention was its ability to offer remote-access with security technology such as SSL-VPN. Its web-based feature allows our salesmen to access and update Sage 30 ERP and Sage CRM anytime or anywhere without having to install any additional applications," Yip said, "when looking for a compatible CRM solution, we needed one that was reasonably priced, flexible, offered local support (Hong Kong) together with tailormade customization and comprehensive reporting tools. Having used customized Sage CRM Advantage Series from Data World, we were satisfied with the solution and service provided and believed in its professionalism to integrate the existing Advantage Series with Sage 300 ERP, which enhanced the cost-effectiveness."

Implementation process and the solution

Subsequently, Nexus Solutions undertook an expedition of less than 3 months to implement Sage 300 ERP and Sage CRM for approximately 20 users. Despite the size of the company, Nexus Solutions had thousands of Excel files scattered everywhere, each serving a divergent purpose. To prepare for the implementation, huge effort was spent to consolidate all information into one single area. Apart from these arrangements, different departments were concerned with the security level, fearing the exposure of confidential information to unauthorized personnel. Moreover, some users were hesitant of the extra time that was required for CRM data input.

To ensure the security level of the CRM, the built-in security functions were enabled to prevent unauthorised access to certain data. By doing so, confidential information such as sales cycle and sales pipeline assignment could only be viewed by supervisors and the management. Throughout the implementation process, trainings and consultations were provided to Nexus Solutions' employees to help them understand better the CRM mechanism, strengthening their confidence in the system.

In spite of the enormous preparation effort, the users, especially the management, were satisfied with the apparent results. Having centralised and standardised all data in a web server, the management could conveniently deploy Sage 300 ERP and Sage CRM through Internet anytime, monitoring the sales pipeline, forecasting business development activities, and analyzing sales cycles.

Nexus Solutions were particularly impressed with the standardization of lead processing and the coordination among the departments, delivering an explicit track to clients and partners. With the newly deployed Sage 300 ERP and Sage CRM, a rule-based operation procedure is systemized to alert the salesmen when a new lead was assigned to them by the Marketing department. Supervisors could easily track outstanding leads and leads not followed-up within one hour of being assigned, thus preventing loss of business and accelerating efficiency.

Coordination between the sales department and the marketing department also improved as each department regularly updated Sage 300 ERP and Sage CRM with their current activities and programs, thereby formulating coherent marketing strategies and events.

"All communications between prospects and clients are recorded in the Sage 300 ERP and Sage CRM and the results started to surface soon after the implementation; the loss of customers reduced greatly and our marketing efforts achieved a much higher response to our surprise. Through the user-friendly reporting tools and target list generation functions, we can now painlessly extract the target database from Sage 300 ERP and Sage CRM. Our partners were greatly amused with our marketing efforts.

Although it was difficult to motivate the staff to enter every transaction with customers and partners in Sage 300 ERP and Sage CRM, the ease of retrieval of the information, analysis and details has encouraged its use. Now, Sage 300 ERP and Sage CRM has become indispensable at Nexus Solutions" Yip observed. In addition, Philip Leung, Network Consultant of Nexus Solutions, commented, "since its implementation, I got several comments from our clients that they seem to be better satisfied with our support service as we answer their needs quicker and in a more efficient manner. In the end, our success comes from the satisfaction of our customers.

Sage 300 ERP and Sage CRM has become an integral part of Nexus Solutions, driving the success of a dynamic and ambitious company. With a clear business direction defined and rapid expansion, Nexus Solutions intends to further develop and improve the system and extends its usage to its branch offices in Shenzhen, Beijing and Shanghai.

"Always in the search for improvement, we are contemplating how we can improve and adopt more advanced CRM techniques for better business growth," says Yip.

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