

Planitec improves pre-sales with Sage CRM



Customer

Planitec

Industry

Project Management

Location

France

Solution

Sage CRM

To strengthen the quality of its business approach whilst optimising and structuring employee procedures, Planitec is migrating to Sage100 CRM i7.

A subsidiary of the SETEC engineering group, Planitec specializes in project management. The company primarily works with major industry players and achieves an annual turnover of approximately 21 million euros. Within the Planitec organization, the employees in charge of customer relations also have other duties, which significantly complicates management of canvassing processes. Moreover, the company has a certain number of remote employees who do not have permanent access to the company server.

"Information on canvassing approaches was scattered amongst salespersons' remote PCs and our central server," explains Rémy Venesi, Sales Manager at Planitec.

"When several employees work with the same client, the relevant information is not always up to date. We had a problem with information coordination and traceability with regard to our prospective clients. Hence, we needed the support of a unique prospect management tool".

There are many reasons why Planitec chose to implement a customer relations solution in 2009.

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Rémy Venesi,
Sales Manager, Planitec

Challenge

Planitec needed to strengthen the quality of its business approach whilst optimising and structuring employee procedures. It chose Sage CRM to co-ordinate information about prospects and clients.

Solution

Sage CRM has allowed Planitec's remote employees to connect to their customer database in real time and update business critical information.

Results

Sage CRM has enabled Planitec to eliminate administrative processes, saving assistants' time whilst increasing productivity.

‘We would like our mobile employees to be able to connect, in real time, to our local server in order to update their client information.’

Rémy Venesi,
Sales Manager, Planitec

A mobile-accessible solution

After using another Sage solution, in 2012, the company decided to upgrade its customer management system to Sage100 CRM i7.

“We wanted our remote employees to be able to connect in real time to our local server in order to upgrade their client information,” says Venesi.

“In addition, we wanted our CRM to be easily accessible to other group subsidiaries who shared the same clients as us, with the assurance of safety”.

“In addition, we wanted our CRM to be easily accessible to other group subsidiaries who share the same client as us. These two limitations are resolved by Sage100 CRM i7.”

Offer monitoring as part of the CRM tool

Planitec also wishes to encourage its employees to systematically enter information into the CRM pertaining to new offers issued, and in this respect has asked Sage to adapt its “Opportunity Monitoring” module.

“The Sage teams have been very efficient with the project and have adapted this module to transform it into an “Offer Monitoring”,” says Rémy Venesi.

This manoeuvre has enabled us to eliminate administrative processes, saving assistants’ time.

Moving forward in this way, we have also centralised the offer monitoring process to form a part of this tool.

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

