

Sage CRM and Sage 200 ERP 'making it easy' for Sign + Digital



Customer

Sign + Digital

Industry

Digital Printing/Sign Making

Location

Dublin, Ireland

Solution

Sage CRM and Sage 200 ERP

Established in 2003, Sign + Digital is the leading Irish distributor of raw materials to sign makers and digital printers. With sixteen staff based at its warehouse and customer showroom in Dublin, Ireland and a regional sales team of four based on the road, Sign + Digital faced lots of challenges as the business grew substantially in the formative years. Like any growing business start-up, dealing with increased sales and customers can affect the productivity of staff and can have an impact on the quality of service provided to existing and prospect customers.

Due to its rapid growth, the sales process had become a 'milk-round' – customer calls were completed on an ad hoc basis and as and when the sales reps were in the customers' areas. Sales teams were burdened with the manual and administrative process of compiling sales and pipeline reports. Managing customer support issues was another purely reactive process as issues were managed as they arose. In addition, there was no pro-active or automated process for developing or monitoring leads: a problem which exacerbated as the business developed.

Solution

Sign + Digital realised that it needed to connect all functions and departments within the company so that it could truly serve its customers better and provide them with an exceptional and more proactive service. They identified Sage CRM as a tool that would address their key issues within sales and customer support.

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Finance Director,
Sign + Digital

Challenge

With an increasing customer base, Sign + Digital found itself dealing with customer issues reactively. Rapid growth in sales put pressure on their internal processes and sales resources and they needed to make their staff more efficient and productive.

Solution

Sage 200 integrated with Sage CRM, providing Sign + Digital with a 360 degree view of their customer across front- and back-office functions. This empowered its sales and customer support teams with the information they required to provide a more proactive

and consistent service to its existing and prospect customers based on accurate and up-to-date information.

Results

Sage 200 CRM has enabled Sign + Digital to effectively and proactively manage the complete customer lifecycle from first point of contact to sales and resolution of customer queries. With more effective automated business processes and centralisation of customer data, Sign + Digital has been able to serve its customers and reach prospects in an ever-changing and challenging recessionary climate.

“Sage CRM was at the very heart of our ethos and was the key driver to help us not only service our customers better but also make our staff work more efficiently and productively. Once Sage CRM was implemented and integrated with the existing Sage 200 application, this ethos became an integral part of our business processes.”

David Walsh,
Finance Director,
Sign + Digital

David Walsh, Financial Director for Sign + Digital explains further, “As an existing Sage house, Sage was a logical choice for CRM. We identified Enbu as being leading consultants in implementing Sage CRM in Ireland and that’s where we went to try and flesh out our vision of what CRM could do for us. That involved having workshops with Enbu, looking at our business processes, doing up workflows and seeing where the improvements could be made. We also looked at the sales training we were currently doing to try and change our sales model and to see how it could link in with Sage CRM.”

Fran Meggs, Director of Enbu further said “Sign + Digital the success of the deployment, as they knew the intrinsic benefits that could be realised from having a central, single solution system that dealt with all features in one holistic approach. As part of the business analysis stage, we looked at their day-to-day and week-to-week processes and then mapped their processes into real CRM facets and functionality.

Sage CRM was customised with these workflow processes to enable them to become more efficient in their interactions with customers and also provide them with transparency of their data, which is the epitome of CRM.”

Integration

As part of the business review process, Sign + Digital developed an ethos to empower employees to drive customer satisfaction across all areas of the business. A customer-focused mantra of ‘making it easy’ for customers and staff was enabled by integrating Sage CRM with their existing Sage 200 ERP system.

David explains “Sage CRM was at the very heart of our ethos and was the key driver to help us not only service our customers better but also make our staff work more efficiently and productively. Once Sage CRM was implemented and integrated with the existing Sage 200 application, this ethos became an integral part of our business processes. The concept throughout the whole implementation was that of one system that would become the main tool of our sales team and our customer support team. To achieve that we had to have seamless integration of Sage CRM with Sage 200.”

Darren Sexton, Commercial Development Manager for Sage Ireland comments, “Sign + Digital had already installed Sage 200 but realised that there was a benefit that they weren’t leveraging – Sage 200’s out-of-the-box integration with Sage CRM to connect the back-office with the front-end through Sage CRM.”

The key drivers for Sign + Digital were centralisation, transparency and accountability of data in a holistic way. Since deploying Sage CRM with Sage 200, all orders are entered into Sage 200 via Sage CRM and all calls that come into the business are either logged as cases or opportunities and fed out to the sales team. There is a seamless integration between sales opportunities, customer issues and day-to-day sales orders that get fed back into Sage 200 for fulfilment through the warehouse. The integration of Sage 200 and Sage CRM provided Sign + Digital with a single powerful source for all their data, providing the company with a central single solution that everyone could use; a 360 degree picture of their customer across the front-and back-office and the insight to enable them to make informed business decisions and serve their customers more effectively.

“It’s about making it easy, having greater customer focus and providing a proactive service to our customers. Sage CRM has allowed us to understand where all our customer support issues are, what issues are reoccurring and what actions we need to address.”

David Walsh,
Finance Director,
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Benefits

One of the intrinsic benefits of Sage CRM is its seamless integration out-of-the-box with Sage 200’s ERP data. Sign + Digital can now report on the data in real-time providing an accurate picture of how sales are performing. The integration of Sage 200 and Sage CRM also enabled Sign + Digital to provide the sales and customer support teams with a tool to manage every interaction with their customers.

Getting the integration up and running was a very seamless and quick process. Each individual had two days training to learn the look and feel of the system and that was all that was required.

The implementation of Sage CRM has played a key role in the overall strategy and development of Sign + Digital particularly in the current challenging economic climate.

David Walsh explains “When we started the process of implementing Sage 200 CRM the world was fully functioning. However, it’s only since the recession began that we are seeing the full benefits of having a CRM system. It’s about making it easy, having greater customer focus and providing a proactive service to our customers.

Sage CRM has allowed us to understand where all our customer support issues are, what issues are reoccurring and what actions we need to address. It’s also about making our sales team more proactive and getting value from the calls they make. Every call has to have a purpose or an opportunity. We customised the pipeline concept in Sage CRM to reflect this investigation of opportunities and automation of the sales process.”

In terms of the future development of Sage 200 CRM, Sign + Digital are working with Enbu to further develop the reporting capabilities of Sage CRM and to integrate the credit control functionality into the system.

This will deliver management with greater business visibility and enable them to manage the sales team more effectively, while extending Sage CRM to all their customer-facing functions to drive a consistently superior customer experience – making it even easier for Sign + Digital to better serve their customer base.

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

