

Sage 300 ERP becomes the right ticket for TELAID



Customer

Telaid Industries, Inc.

Industry

Media

Location

North America

Solution

Sage CRM and
Sage 300 ERP

Telaid Industries is a telecommunications integrator that offers multilocation enterprise companies technical products and services. Products range from structured cabling, AV communications, and phone systems to Hoot 'N' Holler/Squawk networks, speech privacy, wireless systems, and call accounting. Services include AV design and build, network staging, and deployment, as well as on-site technical staffing. Founded in 1981, Telaid focuses on large multilocation rollouts, and 24/7 service and support to more than 35,000 customer locations nationwide. After several years of using Sage 300 ERP as an accounting system, Telaid felt it needed to increase the efficiencies of its business processes through integrating Sage CRM.

Efficiently streamlined nationwide tech dispatching

Prior to implementing Sage CRM, when something would go wrong with a customer's store cash register, POS terminal, or TV the customer would call Telaid. Because the Telaid Service Groups were using disparate pieces of software, if one group was working with a customer, the others might not know it. Duplicate dispatches were going out for technicians who could have solved two or three trouble tickets on the same call instead of going back each time, costing Telaid time and money.

"We formed an Implementation Team of

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Scott Hurley,
General Manager,
Telaid Industries, Inc.

Challenge

Telaid Industries needed a CRM solution that would offer support for more than 35,000 customer locations nationwide. They identified Sage CRM to have the ability to increase efficiencies of its business processes and give the business a comprehensive view of their customers.

Solution

The implementation of a customized integration of Sage CRM with Sage 300 ERP was deployed to keep service groups informed about who is interacting with a customer at any given moment. Sage CRM also provided Telaid with the work flow that they

needed to increase productivity and sales and to stop duplicate orders being dispatched that were costing Telaid time and money.

Results

Sage CRM integrated with Sage 300 ERP gave Telaid the seamless work flow process that they needed. Employees can access customer information when they are on the road, enabling effective collaboration and continuity of a case at all times. They saw an increase in productivity through the successful handling of trouble tickets and dispatch duplications were completely eliminated.

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key employees who were going to be affected most in using these tools,” says Scott Hurley, Telaid General Manager. “They helped to refine and change the old work processes so that the tools would fit the new work processes. We compared software, vendors, and eventually agreed on Sage CRM. The ability to integrate was an important factor.”

Telaid needed a customised version of Sage CRM, which meant also customising the integration with Sage 300 ERP. Sage CRM provided customization tools and an open architecture that greatly reduced development and maintenance costs and allowed seamless integration. The business partners consolidated the entire system, creating a customized locator that searches subcontractors across the country. It identifies the right Zip code, skill set, and work rate to service an account. Sage CRM can also assign the job and create work/purchase orders needed to coordinate the entire job, which go from Sage CRM, out to the field, back to Sage CRM, and to Sage 300 ERP.

As the rollout continues, there are 50 users with plans to expand to 90. Alex Ivins, Telaid service desk manager, says “Sage CRM is a big improvement for working a case through the process to the end. We have customer service groups here in Niantic, Connecticut; Denver, Colorado; and Madison, Wisconsin. They can collaborate on any particular case with continuity, especially during after-hours support. And employees working from home can access this data through the web, putting us all on the same page.”

Web self-service eliminates having to telephone Telaid

“Another one of our objectives was to have a CRM web self-service portal for our customers to enter service requests, without having to call us on the phone,” says Ryan Todd, IT manager. “This allows our customers to process their own cases and check status. Sage CRM has absolutely helped us to do this. It automatically opens a case in our system, and the analyst here can work the case accordingly, dispatch a technician, and then update the case. The customer can print their own report based on their

preferences, requests and history through the customized fields they want to see. With 1,100 cases in our first six months, it’s one of our biggest benefits from Sage CRM.”

One of the most telling qualifications in Telaid winning contracts

The process of winning contracts is changing from forming a relationship with one decision-making manager at the IT or facilities telecommunications level to a very involved qualification process administered by bottom line-oriented procurement and legal professionals. Unlike the one decision-making manager, the procurement and legal professionals are under increasing corporate pressure to decrease the expenditures of goods and services from vendors and suppliers. IT services normally supplied by several different vendors under separately negotiated contracts are being replaced by a trend toward bundling everything with one vendor under one Master Purchase Agreement. “Qualifying as a vendor involves a vigorous due-diligence process. We are required to supply very detailed information about our company infrastructure, processes, and capabilities for accommodating specific customer cost-saving needs. We’re seeing an increase in RFI questions about our having the capability of allowing the customer to integrate invoicing or billing to our accounting system, as well as electronic fund transfer. Without Sage 300 ERP, we could not compete,” says Hurley.

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

