

Tshikululu invests in Sage CRM



Customer

Tshikululu Social Investments

Industry

Finance

Location

South Africa

Solution

Sage CRM

Tshikululu Social Investments is consolidating its corporate image as South Africa's leading social investment management company with specialised and leading-edge systems integration using Sage CRM from Sage ERP Africa.

Greg Arthur, Grants and Programme Services Executive at Tshikululu, says "As South Africa's premier social investment manager, Tshikululu handles thousands of unique funding appeals for grantmaking across the education, health and social development sectors every year. With almost half a billion Rand of corporate social investment grantmaking funds under current management, tip-top systems are needed to best complement quality delivery in other areas of our work.

"This is even more critical because we work intensively with the strategic needs of our clients and the outcomes of this work affect the lives of literally thousands of people across South Africa."

They will use Sage CRM as a central repository to register and track all requests for funding, to house all correspondence relating to an application for funding, record all grants approved, requisition the payments, record the reports from the funded organisations and the indicators for monitoring and evaluation, and to generate transactions for Sage 300 ERP Financials. Each fund managed by Tshikululu is now set up as a Sage 300 ERP company into which Sage CRM will post transactions, thus eliminating the need to double-capture entries. The standard CRM workflow functionality for process flows and procedures as well as the standard notifications and escalations for grant approvals and follow-ups will also be used.

Challenge

With almost half a billion Rand under management, Tshikululu required a CRM solution that would complement the quality delivered in other areas of their work.

Solution

Sage CRM became a centralised repository to register and track all requests for funding, to house all correspondence relating to applications, record approvals, and generate reports from the funded organisations.

Results

Sage CRM has given Tshikululu a complete view of its clients, beneficiaries, and partners, equipping the organisation with the tools it needs to build lasting, more profitable relationships.

The main benefit to Tshikululu will be the use of a new highly customisable system which uses a latest generation SQL relational database (namely MS SQL 2005) which will offer data integrity and security. Existing standard integration between Sage 300 ERP and Sage CRM modules, without the need for developing any integration points, will be an enormous benefit. With Sage CRM being a highly-customisable system, we believe that we can rapidly implement a good product fit into this very unique environment, with the ability to add on more complex functionality at a later stage.

With the creation of workflows and the electronic sign-off (Grant Approval) via workflow actions, Tshikululu will drastically reduce the volume of paper that is currently handled. When the web self-service is implemented this will enable organisations to apply online and track the progress of their own appeals.

In a time when maintaining good relationships is more important than ever, having the 360-degree view which Sage CRM provides is the only way to improve and resolve customer-related issues professionally and efficiently. Sage CRM will give Tshikululu a complete view of its clients, beneficiaries, and partners, equipping the organisation with the tools it needs to build lasting, more profitable relationships.

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

