



Sandler Training Implements Sage CRM for Improved Communication and Strengthen Customer Relationships

“While working with ADS I found their processes and their people to be superior in the marketplace. It’s comforting to know that at any time I can pick up the phone and call a local executive to work through any particular barriers. ADS and Sage CRM just seemed like a perfect fit for us.”

Eric Fry,
Sandler Partner

Who They Are

Sandler Training located in Halifax, Nova Scotia delivers internationally-proven sales, business development, customer care, and management training focused on top line revenue growth for their local, regional and national customers.

The Challenge

As a result of their rapid growth and integration of new staff, collaboration of data was essential in managing their customer relationships. Their antiquated solution created information silos resulting in miscommunication between staff, lack of accurate, real-time data, and missed appointments.

The Result

Working together with ADS, Sandler Training implemented Sage CRM. Due to its intuitive nature, Sandler is using 50% more functionality of Sage CRM than they were with their previous CRM solution. The barriers for knowledge transfer have been removed and staff now have an effective view of real-time data. Since implementation, Sage CRM has made it possible for Sandler to continue scaling the business up with an increased revenue target of 50% for 2013.

For over 10 years, Sandler Training has helped hundreds of business professionals achieve their goals with its successful reinforced training approach delivered within training centres across the region and online. With their continued growth and success, Sandler Training had outgrown their pre-existing customer relationship management (CRM) software, needing deeper companywide integration to manage their time as well as their customer account history. Being on the road and using their mobile devices to take calls, schedule appointments, and manage accounts was a hassle. The lack of integration with Outlook resulted in missed appointments and became a barrier to the business.

In December, 2012 Sandler was introduced to Sage CRM through an innovative promotion, Small Business IT Make-Over, put on by Atlantic DataSystems. Prior to the promotion, Sandler looked at several CRM solutions but none of them quite fit their unique integration needs. After the contest Sandler turned to ADS who took the time to understand their requirements and brought a high level of expertise to the project. Eric Fry, Sandler Partner explains, "While working with ADS I found their processes and their people to be superior in the marketplace. It's comforting to know that at any time I can pick up the phone and call a local executive to work through any particular barriers. The level of technical expertise their team of Consultants has and their knowledge of Sage solutions got us up and running in no time. ADS and Sage CRM just seemed like a perfect fit for us."

With its user-friendly interface, Sage CRM is flexible and easy to configure to suit the preference of each employee without the need of IT support. Fry explains "Our need for a mobile CRM solution was imperative in growing the business. Prior to our Sage CRM integration we just weren't able to manage our time on the road anymore. Taking calls, scheduling appointments, and accessing real-time data out of office was becoming impossible." The Web-based solution integrates seamlessly with Outlook, so whether Sandler employees add an appointment through their mobile device or their laptop it is all centrally stored in the Sage CRM database where it can be leveraged by authorized users at any time, in the office or on the road.

Fry states "Since implementation, our employees can see each other's schedules and access critical, real-time customer data a lot more fluently than we could with our old CRM solution. This benefit allows us to develop and maintain strong relationships with our customers by improving communications and keeping track of everyone's appointments and training sessions. Sage CRM has made it possible for us to continue scaling the business up and keep moving ahead." Looking to the future, Fry states that Sandler Training plans to continue working with ADS to roll out the Sage CRM reporting capabilities and implement the application's case management functionality. "We're looking forward to how else we can integrate more functionality into our business with the help of ADS and Sage CRM."

Our need for a mobile CRM solution was imperative in growing the business. Prior to our Sage CRM integration taking calls, scheduling appointments, and accessing real-time data out of office was becoming impossible.

About Atlantic DataSystems

As a leading IT provider throughout Canada for small to mid-sized enterprises, ADS delivers strategic and technical consultancy, IT outsourcing services, and a comprehensive range of ERP and CRM solutions to help growing companies better run their business.

Through our deep industry knowledge, proven and consistent service delivery and strong technology capabilities, ADS builds long lasting partnerships with our customers to enable a measurable return on technology investment. With offices throughout Atlantic Canada and Ontario, the ADS team of experts is committed to helping businesses leverage technology to achieve their goals.

For additional information, please visit:
www.atlanticdatasystems.com.

