



sage

Customers for Life:
Why Sage is the Only Choice
#customerforlife

Contents

Introduction 3

Banking & Finance 4

PARS	5	
EndureGo	6	
Dixon Advisory	7	
IDM	8	

Distribution 10

Avis	11	
Horizon Spa & Pool Parts	12	
ACME	13	
Inortech	14	

IT & Telecoms 16

Enablis	17	
Fuji Xerox	18	
Cellular Solutions	19	
Micros IT	20	

Manufacturing 22

DWD	23	
Thermo-Twin	24	
Hyundai Construction Equipment	25	
Gressco	26	

Services 28

CommLink	29	
Lincoln Waste Solutions	30	
Capsol	31	
Stapletons Tyre Services	32	

Introduction

A Sage CRM customer is a customer for life

Whether you're the owner of a small IT services business or a manager in a growing insurance company, you need to know your customers. Knowing and understanding your customers is the overarching rule of exceptional companies.

Although companies today are faced with many challenges like working in a highly competitive, data-driven marketplace where technological advances are moving at the speed of light. Customers nowadays are more sophisticated, well-informed and knowledgeable than ever before.

They must keep pace with these changes while reducing costs, enhancing relationships and improving overall customer service.

This is no easy task.

In order to listen to your customers and stay ahead of your competitors, you must be able to rely on an efficient and flexible Customer Relationship Management (CRM) solution which adapts and aligns with your business strategy.

CRM provides a clear and detailed picture of your customers and prospects. It allows you to better understand and anticipate their needs so that you can offer them a differentiated service, building a long relationship for the future.

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.

In this eBook, we invite you to explore a selection of our customers' stories across five industries:

-  Banking & Finance
-  Distribution
-  IT & Telecoms
-  Manufacturing
-  Services

You will learn how Sage has been able to exceed expectations of small and medium sized businesses.

We hope you enjoy reading our customers' stories.

The Sage CRM Team

Banking & Finance





Industry: Banking and Finance
Location: United States
Solution: Sage CRM

“Over the last four years our company’s revenue has grown about 60% and we would not have been able to do that without Sage CRM.”

”

Karen Zfaty

Director of Marketing Information Systems, PARS

PARS realizes significant growth with Sage CRM

Background

Public Agency Retirement Services (PARS) is a financial products and services public agency based in the state of California. Core to its success is the way it meets each client’s unique needs, tailoring retirement plans for its employees; providing superior employee benefits while increasing management effectiveness, reducing costs, and relieving staff administration burdens.

Challenge

Providing retirement services to public agencies is a complex process, from the selling and implementation of tailored policies all the way through to their long-term management. The company’s existing solution didn’t use a relational database so searching for specific information and creating reports was difficult.

Solution

With the help of their local Sage Business Partner, PARS was able to deploy Sage CRM to achieve its business goals. Sage CRM was customized to collect and retain business specific data that is held in a single repository for fast and easy retrieval. Greater efficiencies are achieved as different teams share the same information.

Results

Sage CRM has helped Public Agency Retirement Services double its revenues and improve its reporting capabilities. Karen Zfaty has no doubt that it has played a significant part. “Sage CRM enables us to know what we are doing in terms of where we are, what’s out there, and what we should be going after. It has certainly contributed to our growth,” she said.



Industry: Banking and Finance
Location: Australia
Solution: Sage CRM

“ Sage CRM allows us to become more proactive with clients. We didn't have a good tracking system before but now we have software that allows us to build the business and close the sale. ”

Cindy He
Finance Manager
EndureGo



EndureGo builds a better business with Sage CRM

Background

Established in South Australia in 2006, EndureGo is a professional CPA firm and registered tax agent that provides individuals and businesses with a range of mortgage brokering, taxation, accounting and financial planning services.

Challenge

Information was maintained in an in-house database which provided limited customer information and did not meet its business needs. It required a more functional system that would allow consultants to monitor prospects as they progressed from first contact through to becoming a fully-fledged client.

Solution

EndureGo chose Sage CRM to enable it to efficiently manage sales, marketing and customer service data. Given the recurrent nature of clients financial requirements, it was keen to find a system that would support existing customer relationships with certain functionalities. Consultants now use Sage CRM to record every interaction with prospects and clients.

Results

Sage CRM is being used by EndureGo consultants to record the time, date and details of every contact, diffusing the potential for conflict should penalties need to be imposed. As data is stored in the cloud, consultants no longer have to be in the office to answer client calls or look up prospect data.

Industry: Banking and Finance
Location: Australia
Solution: Sage CRM and Sage 300

“ Sage CRM helps us to respect the client, be consistent with our messages and ensure we remain cognisant of what the client wants. Without Sage, we’d have disorganized chaos. ”

Andrew McPhillips
Chief Technology Officer
Dixon Advisory



Sage soothes Dixon Advisory’s growing pains

Background

Dixon Advisory is one of Australia’s leading independently owned financial advisory firms. It employs over 350 people and boasts a client base of more than 15,000 families.

Challenge

Small business solutions and multiple databases were no longer capable of meeting all of Dixon Advisory’s needs. Client relationships were the backbone of the firm’s business, yet with numerous databases, there was no easy way to achieve a single view of the customer or to quickly understand all recent interactions.

Solution

Sage CRM had the capacity, document management, workflow capabilities, and a seamless integration into the accounting solution (Sage 300) that Dixon Advisory was looking for.

Results

Sage CRM has become Dixon Advisory’s repository for all client information. It has taken on the role of document management system, workflow engine and CRM. McPhillips says, “For our advisers, all the client information can be found in one spot. They can see all areas of the business. We’ve managed to reduce duplication and inconsistencies by getting rid of multiple client databases.”

Industry: Banking and Finance
Location: South Africa
Solution: Sage CRM



“Sage CRM software has enabled us to improve our value, impact and service levels to all our clients.”

Gary Lighte

Operations Director
Intelligent Debt Management

IDM’s customer service levels soar with Sage CRM

Background

Intelligent Debt Management, (IDM), South Africa’s leading debt management company, offers comprehensive advice and a host of highly effective solutions to South African consumers who are facing financial difficulties and struggling with debt.

Challenge

IDM had experienced challenges with its customer management process. It recognized the need for an automated CRM system that could handle large volumes of customer data. “Our business has experienced challenges with customer management processes, which were being handled manually and we were thus in need of a comprehensive and automated client management system,” says Lighte.

Solution

Sage CRM has allowed IDM to effectively manage process workflows and these customization capabilities allow it to adapt the system to its specific business needs. The ability to integrate with other systems enables IDM to scale down on manual work and prevent the duplication of information.

Results

Sage CRM has increased IDM’s process efficiency and turnaround time, whilst significantly reducing the risk of human error. It now has scalable business processes that are reliable and accurate all the while equipping its sales and marketing teams with a centralized tool to manage relationships with customers and prospects

Insightful

“ Sage CRM makes easy work of profiling and managing information about the information that is most important to us. ”

Gerald Scott
President
DWD International

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Distribution





Industry: Distribution
Location: United Kingdom
Solution: Sage CRM



“We now have a system that automates all of the administration in dealing with our customer base. Our operators have a full service and booking history of the callers, therefore we are building up a much deeper impression of the ‘Avis experience’.”

Ann Gallagher
Customer Relations Manager
Avis

Avis improve its customer booking system with Sage CRM

Background

Avis is a long established and one of the world’s best-known car rental company which today operates from over 5,000 locations in 165 countries worldwide.

Challenge

Avis realized that it needed to not only improve the way it received customer inquiries and bookings but also the way it responded to these customer queries in an effective manner. These were being handled by a paper-based system which could not cope with the increasing volumes. In order to offer a more informative service to its customers and to speed query resolution, the new system had to integrate with its mainframe booking system, which until then had been the primary source of customer information but was not fully available to the service department.

Solution

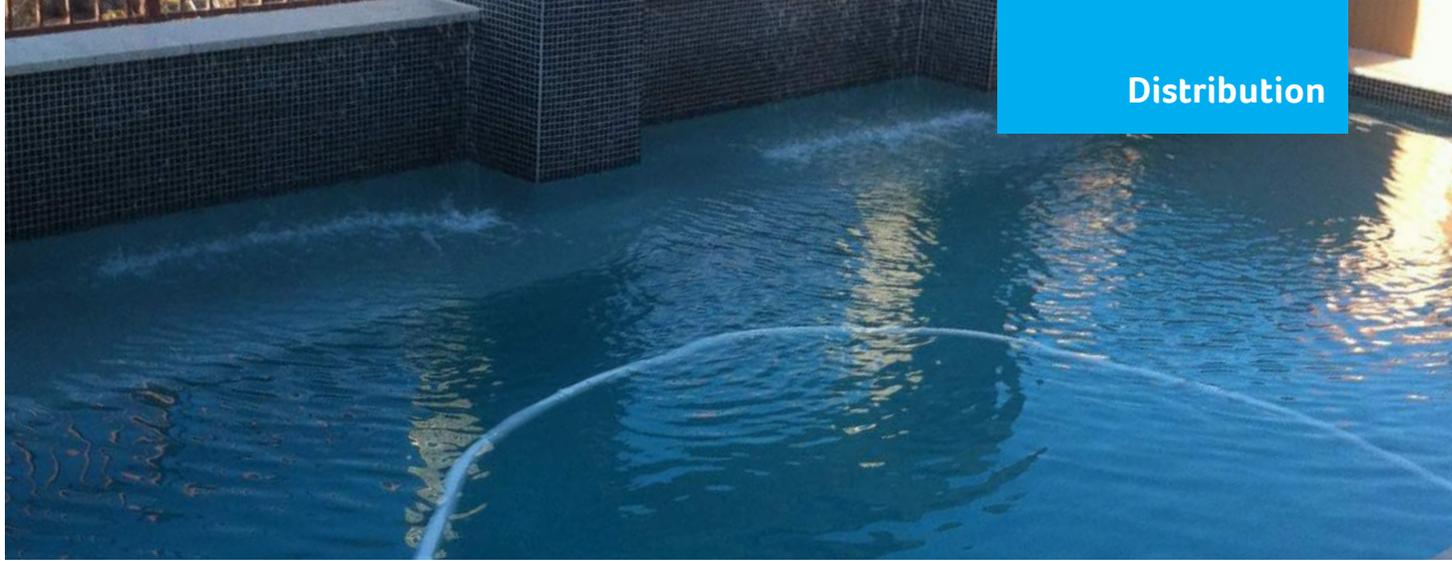
Sage CRM was integrated with the company’s mainframe booking system which provided Avis with a 360-degree view of the customer, increasing efficiencies across all departments.

Results

Thanks to Sage CRM, Avis now has a system that automates all of the customer administration and bookings. The customer service team has a full service and booking history of the callers, allowing them to build up a much deeper impression of the ‘Avis experience’. Ann Gallagher explains “Simply, we now have a system that automates all of the administration in dealing with our customer base. Our operators have a full service and booking history of the callers, therefore we are building up a much deeper impression of the ‘Avis experience’.”



Industry: Distribution
Location: United States
Solution: Sage CRM & Sage 300



“ Sage CRM is a critical part of our company. If we didn't have it, we'd be dead meat—and couldn't even do \$1 million a year, rather than the \$7 million we do today. ”

Becky Moore

Controller
Horizon Spa & Pool Parts, Inc

Horizon Spa & Pool Parts makes big splash with Sage CRM

Background

Horizon Spa & Pool Parts, Inc. is a Tucson owned and operated pool and spa parts distributor catering to the repair and equipment needs of companies since 1992. As a loyal customer, Horizon has relied on Sage for its financial software. Therefore, Sage CRM was an obvious integration to automate customer reminders and manage merchandise returns.

Challenge

Horizon Spa & Pool Parts needed to automate processing of 500 orders per day, including order entry, financials, warehouse management, and returns. With more than 17,000 line items in inventory, keeping track of each status was proving difficult.

Solution

The company chose Sage CRM because of its complete suite of financial modules and integrated warehouse management software. Sage CRM and Sage 300 together gives Horizon real-time information on inventory, so the company knows exactly what items are in stock and where to find them.

Results

Without Sage Software, Horizon would have to hire two people in shipping, three in the warehouse, and could only do 1/7 of its current business volume. In the finance department, Horizon uses Sage 300 to manage payables, receivables, payroll and the general ledger, and to write a multitude of financial reports.



Industry: Distribution
Location: United States
Solution: Sage CRM

“ We have built our business for more than 40 years by offering the best possible customer service consistent with available technologies... Sage CRM is empowering us to continue that commitment. ”

Mike Coatney
President
ACME Truck Line



ACME Truck Line uses Sage CRM to drive customer service

Background

Founded in 1960, ACME Truck Line Inc. is a flatbed trucking service with a fleet of 1,300 trucks. It handles 4,000 loads weekly, each weighing 50-50,000 pounds.

Challenge

ACME Truck Line needed to provide employees with web-based and PDA access to customer data across 70 offices distributed throughout the south. ACME also wanted management tools to allow regional sales managers the ability to track and analyze each phase of the field sales effort and share data with national account management staff. On top of this, the entire solution had to be easy-to-use. Coatney says “Our processes are simple and straightforward and we needed a solution that was equally simple.”

Solution

Sage CRM provides full sales force and customer care automation – all of which can be accessed over the web or through a mobile device.

Results

ACME’s Sage CRM solution enhances the client-customer relationship by providing an integrated framework for applying value-added services and support to new and existing customers. Using Sage CRM, the company was able to simplify many of its procedures. Once a sales rep meets a new customer, he completes electronic forms provided by Sage CRM on his wireless PDA. Now that ACME has up-to-date, information about customers, it has improved client-customer relationships, streamlined business processes and reduced overheads.



Industry: Distribution
Location: Canada
Solution: Sage CRM & Sage 300

“By tracking information through Sage 300 and presenting it to customer service representatives through Sage CRM, we have been able to reduce our collections by an average of 10 days.”

Jean-Marc Pigeon

President
Inortech

Inortech optimizes customer loyalty with Sage CRM

Background

Based in Canada, Inortech Inc. is one of the world’s leading raw material suppliers of paint, ink, plastics, and adhesives. Inortech also offers formulation expertise and in-depth R&D support services and prides itself on exceptional customer service.

Challenge

Because of the volatility inherent in chemical distribution, small to midsized chemical distributors such as Inortech have found maintaining a competitive edge challenging in a lackluster economy. Inortech needed to speed up collections; enhance the tracking of customer information; improve sales processes; and minimize training time and related costs for new sales representatives.

Solution

Sage CRM integrated with Sage 300 provides sales and customer service representatives with easy web-based access to comprehensive information about prospects, customers, and products.

Results

Sage CRM provides Inortech’s sales reps with comprehensive and easy access to information about prospects, customers, sales history, and products which has dramatically cut staff training time. Sage CRM has also accelerated collections for outstanding invoices. Overall Inortech has quicker, more reliable access to information; increased staff productivity and customer satisfaction; reduced training time; and increased sales.

Adaptable

“ One of the real advantages of the Sage system is that we'll be able to keep latching on additional functionality and scale as our business requirements change. This flexibility is very important to us.”

John Evans

CEO
Enablis

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IT & Telecoms



Industry: IT & Telecoms
Location: Australia
Solution: Sage CRM and Sage 300

“ Sage is highly scalable and will provide an integral role in supporting and providing operational efficiency gains. ”

Jon Evans
CEO
Enablis Pty Ltd



IT & Telecoms

Enablis transitions to Sage to sustain future growth

Background

Enablis Pty Ltd offers managed network services and consultancy for organizations running business critical applications across multiple sites. The company helps organizations consolidate IT infrastructure and costs. It works with companies like STA Travel, Reed, Bupa Care Services, Employment Services, Law in Order, and the BBC.

Challenge

The decision by Enablis to choose Sage to support the company's fast growing customer base follows an extensive tender evaluation process during which time the company decided to deploy Sage on-premise. Enablis' previously deployed solution was unable to scale with the growth of the business and would have required considerable customization to handle a fast increasing customer base.

Solution

Sage CRM and Sage 300 empowers Enablis with integrated front and back office business processes and workflows whilst enhancing collaboration between departments and boosting customer service. The solution provides an integral role in supporting operational efficiency gains across sales, support, training and project management business groups.

Results

The company's new solutions allows service staff to access critical customers information and buying history, enabling the company to resolve customer issues and queries promptly. Easily accessible snapshots of business performance data helps to better analyze, predict, and troubleshoot across the business.

Industry: IT & Telecoms
Location: Thailand
Solution: Sage CRM



“The system has played a significant part in growing sales. To compete in the market you want to have accurate information so you can make quick decisions and that is something we have achieved with Sage CRM.”

Chakri Wicharn
Information Manager
Fuji Xerox

Sage CRM transforms the Fuji Xerox sales process

Background

Fuji Xerox is a world-leading provider of business and document services and solutions. As well as manufacturing hardware that ranges from multifunction devices to standalone printers, copiers and scanners, it also offers organizations managed print services.

Challenge

A period of sustained growth saw the business employ more people and increase its depth and range of services. At the same time, the multinational business wanted its regional divisions to provide better forecasts, a strategy that would depend on its ability to collect and collate customer information. Keeping track of customer engagements with paper-based processes was inefficient, creating silos of inaccurate and out-of-date information that was little use to the business in an increasingly competitive market.

Solution

Sage CRM provided one centralized solution. From lead generation all the way through to forecasting, it is a fully integrated sales, marketing and service package that can be implemented in phases and customized to meet specific business needs.

Results

Implementing Sage CRM has sharpened the sales cycle contributing to more revenue and improved customer satisfaction ratings, thus building a stronger customer base. It is enabling the company to launch more effective marketing campaigns and make longer-term business forecasts. “We are expanding our utilization of the functionality in Sage CRM all the time, and will use it in as many ways as we can to influence how the business goes forward,” said Chakri Wicharn.



Industry: IT & Telecoms
Location: United Kingdom
Solution: Sage CRM

“The person answering the phone knows who the customer is, what’s important to them and what they’re potentially calling about before they answer the phone. We have their information at our fingertips, so the client feels a lot more valued.”

Mike Bowers
Managing Director
Cellular Solutions

Customer service soars at Cellular Solutions

Background

Cellular Solutions help businesses manage their communications through mobile phone, landline and fast data network products and services. Based in the North East of England, the company prides itself on exceptional levels of service.

Challenge

With a 25% increase in customers and future growth plans, Cellular Solutions felt it had outgrown its previous system. It was important that Cellular Solutions maintained all of its existing customer information, so being able to transfer it quickly and easily into Sage CRM was a big consideration.

Solution

Cellular Solutions deployed Sage CRM and maintained all of its existing customer information, whilst helping to improve access to customer information across the whole of the business. Managing Director Mike Bowers says that everyone can now clearly see the information they need much easier than before.

Results

Sage CRM has helped to improve its already high levels of customer service. Staff are able to easily access recent communications and sales opportunities efficiently resulting in satisfied customers. Cellular Solutions has seen growth in productivity due to sage CRM. They now have customer information at their fingertips.

Industry: IT & Telecoms
Location: South Africa
Solution: Sage CRM



“Now, our consultants can easily pick up with a glance at the screen whether a customer has a support contract with us or not... This view of the customer helps us to quickly resolve any incident so that we can meet our service level agreements (SLAs).”

Hylton Proctor-Parker
Customer Service Manager
Micros

Micros underpins service excellence with Sage CRM

Background

Micros South Africa is a leading provider of highly tailored IT solutions for the hospitality sector including specialty retail industries such as hotels, casinos and restaurants. It was founded in 1997 and employs over 220 people.

Challenge

From its inception, Micros recognized the importance of being able to provide exceptional customer service on a consistent basis. The company's rapid growth and increasingly complex operations, however, soon meant that it had outgrown the business applications that it had relied upon to manage this important objective. With an average of over 1,200 calls a week, the company needed a highly scalable and flexible application that would grow with the business, and always ensure support cases were resolved on a timely basis and in accordance with service level agreements (SLAs)

Solution

Sage CRM was customized and integrated with their accounting system to help manage and track customer support calls and allow the Micros Support team to manage customer issues effectively and within agreed timeframes.

Results

Sage CRM has enabled Micros to use customer service reports to identify training needs and upsell opportunities. Sage CRM has provided Micros with a way to monitor KPIs for team members identifying how calls are logged and resolved. Sage CRM's workflow capabilities allowed Micros to automate workflows around the different levels of priorities that could be assigned to a case. The system also enabled the support team to reprioritize cases over the course of the day which has enhanced the handling of cases and ensured that less urgent calls are dealt with in an appropriate timeframe.

Growth

“ The system has played a significant part in growing sales. To compete in the market you want to have accurate information so you can make quick decisions and that is something we have achieved with Sage CRM. ”

Chakri Wicharn
Information Manager
Fuji Xerox

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Manufacturing





Industry: Manufacturing
Location: United States
Solution: Sage CRM

“The follow through since implementation is really making a difference to the business. We are well on our way with Sage CRM which has been, and will continue to be, an excellent investment for DWD giving an incredible return.”

Gerald Scott
President
DWD International

DWD International gain greater visibility with Sage CRM

Background

DWD International designs, manufactures and maintains HVAC systems for the oil and gas industry. Its products are used on offshore platforms and rigs, in refineries and chemical plants. The company’s systems can be found at diverse locations around the world, from production facilities in Alaska to platforms off the Gulf Coast. Customers include BP, Chevron, ExxonMobil and Shell.

Challenge

DWD needed to add structure and workflow to its sales and service departments to support a fast-growing customer base that expects premium service, regardless of the inaccessibility of its remote sites. Relying on Excel spreadsheets, not just for sales but for tracking a growing service business, was time consuming and inefficient.

Solution

Sage CRM supports a highly distributed workforce without the hassle of on-premise investments and offers features and functionality far beyond traditional sales pipeline management.

Results

With Sage CRM, DWD International has greater visibility of its sales pipeline and is better able to support its after sales customer service and maintenance business. Sage CRM workflow imposes a process on sales; a custom module built specifically collates detailed records for much greater scrutiny; and the dashboard brings it all to the surface for management to see. Overall, DWD is in a much better place to continue on its growth trajectory. Gerald Scott says thanks to Sage CRM “The follow through since implementation is really making a difference to the business”.



Industry: Manufacturing
Location: America
Solution: Sage CRM & Sage 300

“ Sage CRM gives us a real quick overview of where we’re at and where we’re going. It’s absolutely excellent software. ”

Dennis LeVan

IT Manager
Thermo-Twin Industries



Sage CRM – Empowering Teams at Thermo-Twin

Background

Thermo-Twin manufactures and sells energy-saving windows, doors and sunrooms to the construction industry, direct to its customers across the US. Previously, its established route to market was a telesales operation for lead-generation.

Challenge

Working off a database of 300 active customers and nearly 1,500 prospects, the business felt it was underperforming and hampering sales. These disparate databases and standalone systems were making it difficult for management to analyze the business and plan for future strategies.

Solution

The company deployed an integrated CRM and accounting solution achieving a joined-up view of the business. With this single source of customer, sales, marketing and management data, teams are empowered with easily accessible information that helps them do their jobs more effectively, saving time and increasing productivity.

Results

Integrating Sage CRM with their accounting solution has become mission critical for Thermo-Twin, facilitating a 25% growth in sales and near-instant reports on where revenue is coming from, now and into the future leading to improved decision making.



Industry: Manufacturing
Location: Australia
Solution: Sage CRM

“Sage offered a solution that was analytically robust, customer focused, and cost effective. It delivered what we needed and it gave us the ability to expand our infrastructure moving the business forward at a rapid pace.”

Marc Golby
Systems Manager
Hyundai Construction Equipment

HCEA constructs superior customer service with Sage CRM

Background

In a little under ten years, Hyundai Construction Equipment Australia (HCEA) has established itself as one of Australia's largest and most reputable construction equipment brands. HCEA supplies earthmoving and construction equipment and after sales services to customers throughout Australia and Asia.

Challenge

Customer information was maintained in spread sheets. This had many limitations, particularly when it came to obtaining and sharing information. “We couldn't manage what the reps were doing. We wanted to replace the Excel system with a new, innovative product that would give our sales teams the opportunity to be more mobile and that would enable discussion among the whole HCEA community,” Golby says. In short, HCEA required a fully-featured CRM solution.

Solution

Sage CRM's cloud-based solution allows HCEA's sales teams to be more mobile and communicate efficiently with other departments. Sage CRM is now the central resource for all sales activities and communications linked to customers.

Results

Sage CRM provides HCEA with a central depository for critical customer information and provides sales teams with important information for opportunity management. For example, if a service is coming up, it gives territory managers the opportunity to raise a conversation with the customer. Summing up his Sage CRM experiences, Golby concludes, “The software solution is well priced. It's an easy to use tool that drives better business practices with complete flexibility. And at HCEA, it's a valued product.”



Industry: Manufacturing
Location: United States
Solution: Sage CRM & Sage 300



“The whole company is able to work together as a team to give our customers an exceptional experience. We are able to offer higher service levels to more customers with fewer people.”

Christopher Krumm
Vice President of Finance
Gressco

Sage CRM provides the tools for Gressco to grow

Background

From colorful, imaginative children's furniture, to the functionality of a classic library display, Gressco provides the specialized products that make learning and play spaces inviting, interactive, and long lasting.

Challenge

Gressco's largely manual and disconnected systems for handling marketing communications, opportunity tracking, and customer support were no longer adequate as the company grew. It recognized the need for a comprehensive, centralized CRM solution. Gressco's top priority was finding a CRM solution that could streamline, automate, and improve all aspects of its marketing, sales, and support activities.

Solution

Sage CRM was selected for its broad functionality and flexibility to address marketing, sales, and support challenges and for its integration with the company's accounting solution.

Results

Through targeted marketing, the company is able to tailor its catalog mailings to the desired audience, saving money and improving campaign results. Customer service levels and response time have improved. Opportunities are now tracked from initial communication, increasing the win ratio. Seamless integration with Sage 300 eliminates duplicate data entry and provides sales and marketing teams with a complete picture of the customer relationship.

Affordable

“ I’ve been involved in some major system implementations in the past and knew what we needed. Sage offered a solution that was analytically robust, customer focused, and cost-effective. ”

Matt Golby

Systems Manager

Hyundai Construction Equipment Australia

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Services



Industry: Services
Location: United Kingdom
Solution: Sage CRM

“ Sage has dramatically increased the amount of business we have, and I expect to see a 50-75% growth on turnover as a result of our marketing and sales efforts within the next 12 months. ”

Mike Burkinshaw
Managing Director
CommLink



CommLink grows by 50% with Sage CRM

Background

CommLink provides a range of communication services, from front-of-house call answering to complete customer contact center solutions 24 hours a day. Clients range from sole traders to large national and international companies that use CommLink to represent them to its customers and as an intermediary in their disaster recovery plans.

Challenge

Customer relationships are integral to the success of every business, but for CommLink they are particularly crucial. Despite bad experiences with CRM systems in the past, CommLink needed a new solution that could support these relationships and the company's next phase of growth and development.

Solution

Sage CRM ticked all the boxes for CommLink with its easy-to-use-interface, rich features and functionality to support sales and marketing, and the capacity to be integrated with other in-house systems.

Results

Sage CRM contributed to 50% year-on-year growth for the business and improved customer satisfaction levels by 20-25%. The application is now being used to drive the next phase of growth and a new business. Burkinshaw sums up “Sage CRM's configurability has been key as our business develops and moves into different areas. I'm confident we can achieve virtually anything we want with Sage CRM and that's good to know”.

Industry: Services
Location: United States
Solution: Sage CRM and Sage 100

“Sage CRM drives efficiency which is the same as profitability for a business like ours. Information is king. It gives us a level of reporting and a snapshot of each aspect of the business with a level of detail that we didn’t have before.”

Jay Lentz
Client Development Executive
Lincoln Waste Solutions



Customer service and support is transformed at LWS

Background

Headquartered in Bloomfield Connecticut, Lincoln Waste Solutions (LWS) operates a brokerage service, acting as a middleman connecting multi-site businesses in the US and Canada with waste disposal specialists, negotiating deals that benefit both parties while giving itself a revenue stream.

Challenge

LWS had outgrown its systems and needed a solution for managing the sales pipeline, improving customer support services and achieving a better overall view of the business. Jay Lentz, Client Development Executive, recognized that the missing piece in the jigsaw was a CRM solution. “We wanted to have reporting and all the communications in one place. When we took on a new client there was no natural transition in our systems from being a prospect to a customer,” he said.

Solution

Sage CRM provides a single source of data that integrates sales, customer service and marketing, increasing operational efficiencies at the same time as well as providing real-time insights to better inform future business strategies.

Results

Sage CRM has delivered a big list of business benefits which is expected to grow even bigger as the system develops. Already, LWS is a more agile business and more productive in its day-to-day operations. Having real-time access to accurate data makes it easier to identify emerging trends and react. Customer support has been transformed. Streamlining access to data has led to a 40% increase in the efficiency of support services. Previously, incoming customer queries could only be dealt with by looking through disconnected spreadsheets.



Industry: Services
Location: South Africa
Solution: Sage CRM and Sage 300

“Increased conversion from sales leads into revenue is key to our success, as is detailed reporting and analysis that can aid us in making informed decisions. Sage CRM provides all of this for us at an affordable price tag.”

Philip Mayer
Chief Executive Officer
Capsol

Capsol delivers superior customer service with Sage CRM

Background

The Capsol Group, established in 1996 as a family-run business, providing upmarket, luxury holiday villa, apartment and rental accommodation in South Africa.

Challenge

Since 2009 Capsol experienced significant growth due to increased marketing and demand in the market. This brought about a need for an integrated CRM and accounting solution. Philip Meyer, CEO of Capsol explains “Our clientele base had grown significantly, which necessitated the need for more sales staff. Our operational structures and systems were simply not sufficient to handle the rapid expansion. We needed a CRM and accounting system that would suit our needs,” says Meyer.

Solution

Embarking on a thorough analysis and comparison of around 35 comparative CRM and accounting solutions, Capsol decided on Sage. “Sage’s ease of use, proven track-record and ease of customization were key factors in our decision.” he explains.

Results

Sage CRM provides Capsol with detailed reporting and analysis that helps them make informed business decisions. Sage CRM functionality also helps lower operational costs and increase the productivity of staff. “With Sage CRM’s hosted server, the entire solution is available in the cloud, providing us with access to the information from anywhere as long as we have internet connection, keeping us mobile and informed, which is exactly what we needed at Capsol,” concludes Meyer.

Industry: Services
Location: United Kingdom
Solution: Sage CRM



“ Sage CRM helps by creating a centralized repository of data, shared by all our teams – we’re making it as easy as possible for any of the team to pick up and handle customer queries; they’ll have the sales data and history right in front of them. ”

Andy Scaplehorn

IT Manager
Stapletons Tyre Services

Stapletons moves business forward with Sage CRM

Background

Stapletons Tyre Services Ltd (STS Group) was established in 1937 as a supplier to the motor industry. The company later expanded into specialist tyre retailing and today offers a comprehensive range of wholesale and retail tyre sales and distribution. Turnover stands at £120 million a year.

Challenge

As Stapletons Tyre Services grew, it recognized the need to improve sales forecasting and sales analysis. It needed to be able to identify which brands or ranges of tyres were not selling well, find out why and construct a marketing campaign around this information to boost sales.

Solution

Sage CRM was implemented across the organization with some minor customizations of screens and reports, data migration and integration to an existing specialist application to provide daily downloads of customer information into CRM.

Results

As a result of Sage CRM, Stapletons Tyres has increased the efficiency of its sales and customer service teams. Customers are impressed with their responsiveness. Thanks to Sage CRM, Stapletons can now target the right customer at the right time. Marketing activities and campaigns are more targeted, so that the company’s campaigns achieve optimum responses.

Easy

“ Sage CRM is a very easy solution to customize, and it is simple to add alerts or specific fields to monitor the new processes deployed at the organization. ”

Emiliano Fernández Marín

Director

CISET

#customerforlife



Sage energizes the success of businesses and their communities around the world through the use of smart technology and the imagination of our people. Sage has reimagined business and brings energy, experience and technology to inspire our customers to fulfil their dreams. We work with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners and developers who drive the global economy. Sage is a FTSE 100 company with 14,000 employees in 24 countries. For more information, visit www.sage.com.