



SalesLOGIX[®]

Success Story Everything connects for Ergo!



KEY ACHIEVEMENTS

- Brought consistency to the Sales Team - all access same customer information pool
- Back-end Integration with Sage Line 100 Accounting
- Transformed quote management process, more professional, customised and efficient
- More focused marketing campaign activity
- Improved Account Management and Cross Selling
- More co-ordinated Customer Support activities

Ergo is a leading IT Services company offering IT products, Systems Integration and Managed Services to over 3000 customers. Its headquarters are in Dublin, and a regional office in Limerick serves its mid-west client base.

In 1999 Ergo was not unlike many businesses today with customer information stored and accessed in many different locations - mailing lists in Excel, contact information in their contact manager system (Tracker), sales and order information in their accounting database (Sage).

Challenge

Driven by the need to replace

Tracker, Ergo faced two avenues: a direct replacement with another contact manager such as ACT!, or to invest in a more advanced CRM solution.

“The benefits of a direct replacement were tempting - it was the least expensive option and the easiest to implement as it only involved the existing Tracker users. However this move would not align itself with the future business direction we had envisaged. If the bar was being raised for the business as a whole we needed cast iron processes and systems to enable us to deliver.” explains Mr Frazer Furlong, Marketing Manager, Ergo Services.

CUSTOMER SUMMARY

- IT Services company
- 100 employees
- In excess of 30 users
- Established in 1992
- Over 3000 customer records

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Solution

Ergo reviewed their complete sales cycle from lead generation to invoice collection. Delivering integration with their existing Sage Line 100 accounting system would be a key deciding factor in selecting a CRM system.

“A key element of the project for us was to identify the ‘must have’ requirements for the system. In doing so we quickly recognised that these requirements would change not only as our business evolved but also as we begun to understand the real potential for CRM” he adds.

Key requirements that Ergo and its Business Partner identified were:

- Campaign Management: While Excel listed the contacts involved in each campaign, it didn’t allow them to see which campaigns each contact was involved in. It was also difficult to determine the success of each campaign e.g. the relationships between campaign costs and sales generated.
- Account Management: Ergo transact with companies and interact with contacts within those companies. It was vital that the solution used an Account Hierarchy so Ergo could immediately view sales to each customer, products and services sold, the potential and the contacts with responsibility for each product.
- Quote Management: Nearly all Ergo sales originate with a quote. As some sales cycles can be very short (call back to order) the system had to be able to view current stock levels as well as generate quotes.
- Order Management: As the CRM system would generate quotes, it was logical that the Sales Team would access the same system to create an order as opposed to using the Sage application. As the system evolved, Ergo also wanted to introduce a web-based service to allow customers to order on-line.

Name	Group	Price	Item Number	Status
1 MTR RJ45 CABLE GREEN	HARD	60.76	P21/021150533	AVAILABLE
1 MTR RJ45 CABLE RED	HARD	60.76	P21/021150531	AVAILABLE
1 MTR RJ45 CABLE YELLOW	HARD	60.76	P21/021150532	AVAILABLE
1 PACK OF CD LABELS	DCP	62.94	180007	AVAILABLE
1 8MTR LINK CABLE	INKP	62.41	P14/57811	AVAILABLE
10 METER POWER CABLE	HARD	612.06	P21/79999A	AVAILABLE
10 METRE PATCH CABLE	INKP	68.13	P14/UTP CAT 5	AVAILABLE
10 METRE PATCH CABLE	HARD	68.13	P21/2N57110	AVAILABLE
10/100 CARD	INKP	6219.35	P2/043554	AVAILABLE
10/100 ETHERNET FOR IP21	LASR	6304.74	P14/4322-4162	AVAILABLE
10/100 TX NIC	HARD	662.18	P21/050138	AVAILABLE
100G A3 OVERSIZE PAPER	DCP	653.68	9008893	AVAILABLE

Name	Group	Qty	Unit Price	Extended Price
1 20MB RAM CARD	HARD	3	6100.00	6300.00
HP 1100 PRINTER	LASR	2	6420.00	6840.00

Product Search: 10 M Group: []

Cost Price: £12.06
6 %: £12.78
10 %: £13.27
15 %: £13.87

Qty: 1
Sale Price: £0.00
Expected Buy Price: £12.06
% Mark Up: 0
Sub Total: £0.00
Quote Total: £1,140.00

Type: INV

Buttons: Insert Product, Insert Ad Hoc Product, Delete Product

Quote Builder illustrated

- Customer Support and 24 x 7 Service: While the initial project would focus on the sales organisation, once established, Ergo wanted to complete the CRM vision by leveraging the centralised database. This would mean that the system would be required to provide functionality for the Customer Support team responsible for managing after sales support. As today’s market environment also expects 24 x 7 Service, Ergo were clear that they wanted to ensure that they would not lose a competitive edge by being unable to deliver this.

“SalesLogix has had a major impact on how we manage our CRM activities. Through integration with Sage Accounting we now have a 360 degree view of all our customer information. Everyone who interacts with a customer can see a complete history of past sales, past activities as well as all activities planned for the future. As we have a number of divisions, our internal communication has improved dramatically” enthuses Mr Furlong.

“The flexible nature of SalesLogix has allowed us to adopt an incremental approach to the solution. It is impossible to over emphasise the role of change management in the overall process and we are not surprised how the ‘big-bang’ approach adopted by other CRM vendors can result in failure” he adds. Ergo has recently added the Customer Support modules to their SalesLogix implementation and once the web components are made ‘live’,

this will enable them to offer 24 x 7 assistance to their customers.

“Increasingly, our clients are looking for extended service support. Whether it is to report an issue or simply to enquire the status of an outstanding query, there is an expectation of 24 x 7. We are confident that SalesLogix Support Self Service will help us to meet these needs” explains Mr Bryan Murphy, IT Manager, Ergo Services.

Results

“Overall the impact of SalesLogix has been very positive. As it supports Citrix, it has allowed us to have people working from home. Our marketing campaigns can now be fully managed from within SalesLogix with new customers and orders analysed by campaign.

Our quotes are electronically generated and sent via email or fax using Exchange and Omtool Fax Sr. Stock can be checked in real time prior to orders being entered into SalesLogix, and with new customised reports, we can provide sales managers with all the information they need to make decisions,” Mr Furlong adds.

Smart business is more than just technology - that is why Ergo provides products, services and solutions that empower people to achieve more.

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