

SalesLOGIX[®]

Steljes now has greater visibility and immediate access to management information

KEY ACHIEVEMENTS

- SalesLogix has enabled Sales to accurately identify the discount levels for each and every account.
- The tight integration between SalesLogix and Sage Enterprise accounting system provided greater visibility and immediate access to information.

Customer Profile

The Steljes Group is one of the largest distributors of electronic presentation equipment and value-add services in the UK, with annual revenues of over £35million and a channel base of 1000 resellers developed over 15 years.

The Group consists of four disparate divisions; Trade Sales & Distribution; Trade Hire; Design, Develop and Installation (DDi) and Services. On a day-to-day basis each of these divisions function autonomously and maintain their own customer and support databases.

Case Study

The principal business driver that led Steljes to introduce SalesLogix from Sage CRM Business Partner Pythagoras was the ability to effectively share information across the company.

Hennie Stapelberg, Steljes Management Accountant (CRM Project Lead), explained, "We needed a system that would ensure effective information flow across all our business divisions. If one division had a good rapport with a customer, all other divisions should be aware, and be able to leverage that relationship to cross, or up sell products or services.

Solution searching

Steljes reviewed numerous solutions and system integrators but settled on SalesLogix. Hennie commented, "Once we'd seen the benefits that SalesLogix could deliver, and the integration possibilities with our back office Sage Enterprise accounting system, SalesLogix was the only choice."

He continued: "We were confident in our choice of Pythagoras, who clearly demonstrated to us their ability, expertise and the support systems necessary to handle the demands of our project.

Complex consultancy

Having made the decision to introduce an enterprise-wide CRM system, the first stage was for Steljes to form an implementation team made up of members from each of the four business units. Intensive consultation between the two companies resulted in Pythagoras publishing a project-scoping document, which detailed out each and every aspect of the company's requirements. This document formed the backbone of the project.

Sales benefits

"The Business Partner has fulfilled and exceeded the original project objective of enabling the four disparate Steljes sales teams to access customer information from a single point", noted Hennie.

The integration of SalesLogix with Sage Enterprise has enabled Steljes to redefine and streamline its sales model. An example of this, is the visibility the sales teams now have of inventory levels, customer credit limits, account status and order tracking right down to the individual serial number shipped against a given order.

Sales are able to make informed decisions based on real-time information, be proactive in setting customer expectations and have become increasingly efficient and consistent in communicating with customers.

"SalesLogix has brought clear account visibility in other ways", explained Hennie. "Sales can now accurately identify the discount levels for each and every account which was not always apparent using the old system."

The automation of other business processes is also helping the teams and the company to become increasingly efficient. Using the Pythagoras developed Sales Order Processing (SOP) functionality, sales are able to enter orders and generate invoices. Customers benefit by receiving their order without any undue delay, sales benefit by the reduction in paperwork, and the company benefits through

the immediate despatch of invoices, which helps to ensure that outstanding payments are effectively managed.

From a management accountant's perspective, the tight integration between SalesLogix and Sage Enterprise accounting system is providing greater visibility and immediate access to information. Management now have a clear understanding of each aspect of the business, are better informed and able to make pre-emptive decisions.

Inventory control & logistics

"Inventory management and logistics is a crucially important aspect of Steljes' business due to the volume of products that we ship, and it was an essential requirement to build into SalesLogix the ability for sales to be able to view all stock and inventory levels", Hennie continued.

"The benefits of opening the company's stockholding position, products on back order, products on reserve awaiting order confirmations, despatch and so on, is that staff can immediately set the customers expectations. For instance, it may emerge that there is a shortage of a particular line item, sales are

therefore in a strong position to cross sell a similar product."

The SalesLogix system also captures other product details including the serial number. Sales are able to generate warranty certificates and are now able to easily validate warranty claims for goods being returned for repair. Staff are wasting significantly less time making sure that the product being returned was originally supplied by Steljes.

Remote Working

SalesLogix fits perfectly with the Steljes sales model in other ways. Hennie explained, "Steljes sales people are predominantly office based but we do have field sales and remote working staff. It was important for all of our staff to be able to make changes to the system and to receive updates logged in the main database. SalesLogix is easy to maintain and has proved to be extremely reliable."

Hennie Concludes

"SalesLogix does everything we had hoped. It is providing the visibility that we required. Our ability to respond to customer issues has improved, and our people are more efficient and productive."