

# Extending the power of CRM across your business

Why businesses are prioritizing an integrated CRM and ERP solution

# Contents

1. What can CRM do for your business?	3	6. Five key areas that will benefit from a CRM and ERP solution	25
2. How does CRM integrate successfully with ERP?	5	6.1 Management	26
3. What you'll learn in this eBook	6	6.2 Sales	28
4. The challenges of disconnected systems	7	6.3 Marketing	30
4.1 Inaccurate information	8	6.4 Customer Service	32
4.2 Unnecessary paperwork	11	6.5 Finance	33
4.3 Disconnected data	13	7. Conclusion	35
4.4 Inefficient processes	15	8. How can Sage CRM help?	36
5. Six ways you can benefit from a joined-up business	18		
5.1 Transform the customer experience	19		
5.2 Market more effectively	20		
5.3 Empower productive employees	21		
5.4 Work faster and smarter	22		
5.5 Use visibility to drive profitability	23		
5.6 Pitch products to the right people	24		

# 1. What can CRM do for your business?

As the owner or manager of a successful company, you may already know the benefits of an Enterprise Resource Planning (ERP) solution and the value it brings to your business. You may have had less time to consider how ERP can integrate with Customer Relationship Management (CRM) software and increase efficiencies and productivity in your company.

CRM was once considered the preserve of sales, marketing and customer service teams, but it's not just a departmental tool. Gartner defines CRM as a business strategy that optimizes **profitability**, **operational efficiency** and **customer satisfaction** by implementing customer-centric processes\*.



\*Sussin, Jenny. Gartner CRM Key Initiative Overview, March 14th, 2014.

# 1. What can CRM do for your business?

Every business has the opportunity to transform itself into a customer-centric company and plan for its future based on measurable experiences rather than hunches.

Your business can benefit from an integrated CRM and ERP solution. You can:

- **Improve interdepartmental communication** by enabling disparate departments to collaborate more easily.
- **Reduce data and work duplication** by giving employees the means of updating a single, central database rather than wasting time patching business processes together.
- **Make more informed business decisions** by providing managers and business owners an enhanced visibility over their business and customers.
- **Become more customer focused** by allowing each department to track and record key customer information and by making it available to relevant people throughout your business.
- **Drive profitability with more productive employees** and more efficient business processes.



## 2. How does CRM integrate successfully with ERP?

A business wide approach to CRM bridges information gaps between departments, and it enables teams to collaborate on critical business and customer information. It supports customer facing departments throughout the business including sales, marketing and customer service teams.

Part of this business-wide approach should address linking CRM and ERP, so as to empower your business to sell more efficiently, market more effectively and transform the customer experience. And it should connect with your ERP solution without demanding a significant investment of time or resources.

Having these information sources connected and available to customer facing employees means your company will become more productive. For example, a member of your sales team will be able to view customer financial summary information within CRM. Similarly, your sales team should be able to find the invoice history and sales orders of your customers all within CRM.



Watch Sage CRM Principal David Beard discuss why a joined-up business should be your top priority



<http://bit.ly/JoinedUpB>

## 3. What you'll learn in this eBook

Our customers around the world have been telling us about the many benefits their business experiences with an integrated CRM and ERP solution. We created this eBook in order to bring all their experiences together in one place so you can see for yourself the benefits an integrated CRM and ERP solution can bring to your business.

Throughout this eBook, we provide practical examples of how real-world businesses are benefiting from a single source of consolidated business data.

First, we provide examples of barriers in the customer lifecycle that disconnected systems place on businesses. Then, we describe six ways your business can become more efficient. Finally, we explain five key business areas that stand to benefit most from an integrated CRM and ERP solution.

When you are finished reading, you will understand why Sage ERP customers are prioritizing an integrated CRM and ERP solution in their business.



## 4. The challenges of disconnected systems

Did you know disconnected business systems slow down the time it takes to close a sale? Regardless of the size of a company, silos of information are obstacles to becoming more efficient, and these barriers can reduce the productivity of employees. This can cause:

1. Inaccurate information
2. Unnecessary paperwork
3. Disconnected data
4. Inefficient business processes

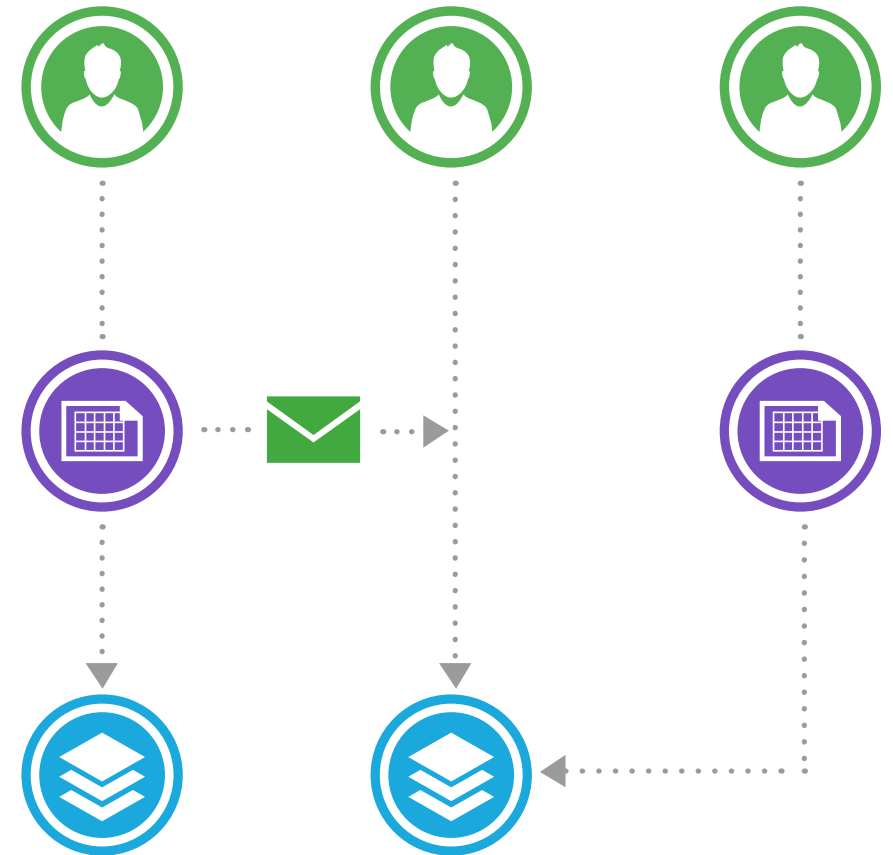


## 4.1 Inaccurate information

Businesses experience more mistakes if there are multiple sets of information with different people entering data at different times.

For example, businesses often use spread sheets to compile data related to account handling, sales processing, shipment and accounts receivable. Employees may then email copies of these spread sheets to other team members throughout their working day.

This manual method of handling data increases the potential for error and the probability of mistakes. It also means your employees spend more of their working day ensuring data is accurate and current.





?

Have you ever analyzed a spread sheet report only to find other members of your team are reporting on a more recent version?



Lincoln Waste Solutions is a US-based waste management company that works with businesses.

Previously, Lincoln Waste Solutions relied on a complex service chain with multiple touch points that contained inaccurate customer information.

As the company grew, it faced problems such as business inefficiencies, a lack of communication across teams and difficulties managing information consistently. Lincoln Waste Solutions decided to integrate its Sage CRM and Sage ERP solutions to streamline its processes and simplify communication across the business.



“[Now] with the two systems tied together, if a name is changed or core data altered, it is updated across the system,” says Jay Lentz, Client Development Executive with Lincoln Waste Solutions.

“Integration has helped us consolidate and de-duplicate information, increasing database integrity by a significant amount.”



Jay Lentz  
Client Development Executive  
Lincoln Waste Solutions



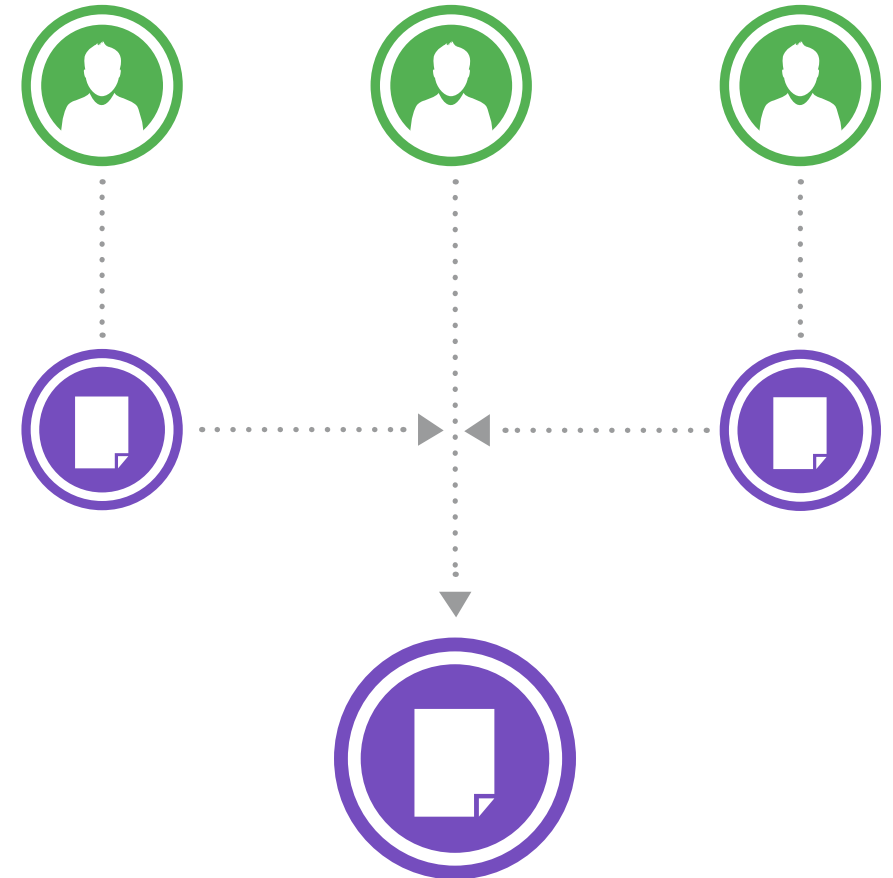
<http://bit.ly/LincolnWaste>

## 4.2 Unnecessary paperwork

Paperwork is a necessary evil in many businesses, but that doesn't mean it should take up more time than necessary. It's easy to gauge if your company is spending too much time on paperwork.

### Consider:

- ❓ Are your employees stitching business processes together by manually keying in data from their paperwork?
- ❓ Is the gathering of paperwork slowing down your business's day-to-day processes?
- ❓ Do your teams revalidate information from one system to the next?
- ❓ Is your business using separate customer datasets that lead to process duplication and is there a risk of order-processing problems as a result?



With an integrated CRM and ERP solution, your company can avoid unnecessary paperwork by enabling managers to authorize purchase requests by clicking on a link in an email. Similarly, your sales and customer service teams can store important customer information securely and link it to appropriate management documentation.

Micros South Africa is an IT services company that employs sales people, customer care teams and technicians who spend a significant amount of time working remotely on customer sites.

Following a successful CRM and ERP integration, its customer care teams are now able to document and manage customer care cases directly within CRM. This reduces the amount of time employees spend on paperwork.

“

“Previously we had a paper trail,” says Barbra Ferreira, Maintenance and Software Controller for Micros South Africa. “Now there are no email documents to print off or dockets that have to be re-entered.”

”

**micros<sup>®</sup>**



## 4.3 Disconnected data

Your business's productivity and efficiency could be hampered if different departments are only able to access data from their part of the business. Your company could also be affected if the data employees are using is inaccurate or out of date.

**This was a key business challenge customers identified in a survey, which Sage carried out in France, Spain, Germany and the UK during 2013.**

**Over 40 percent of customers said inconsistent and separate data across the business was a key challenge prior to connecting their CRM and ERP solutions.**

For example, a sales team's ability to access the latest product information or the credit worthiness of a customer will affect the length of a sales cycle. Conversely, CRM data that feeds through to accounts prevents unnecessary administrative overheads and inefficiencies.



Troy Industrial Solutions is one company benefiting from more connected data. It supplies belting products to a wide range of industries in the US. It uses Sage CRM with Sage ERP to enable their field sales reps to access real-time information on the accounts of the companies they call on.

The company generates numerous customer quotes each day from different parts of its business. Prior to implementing an integrated CRM-ERP solution, the company's management found it difficult to get an overview of what happened to these customer quotes.



"Our team selling approach is much more efficient because the right-hand knows what the left-hand is doing," says Bill Keogh, Sales and Marketing Manager with Troy Industrial Solutions.



Bill Keogh  
Sales and Marketing Manager  
Troy Industrial Solutions



<http://bit.ly/TroyIndust>

## 4.4 Inefficient processes

Without accurate and up-to-date information, inefficiencies creep into the business and opportunities are missed. However, if you keep customer information in one place, your business gains a single view of its business processes and a better understanding of what is succeeding and failing.



Have your sales and customer service departments ever had to reconcile conflicting customer information?



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

After the company deployed an integrated Sage CRM and Sage ERP solution, it achieved a joined-up view of its business and was able to improve key sales initiatives. As a result, Thermo-Twin industries made cost savings and improved its return on investment.

**In the next chapter, we describe six ways a joined-up business can succeed with an integrated CRM and ERP solution.**

“

“We scaled back the department and spent the money elsewhere to get a better return,” says Dennis LeVan, IT Manager with Thermo-Twin Industries. “We have better visibility, not just of sales but where the leads are coming from. It has helped us rethink our strategies.”

”

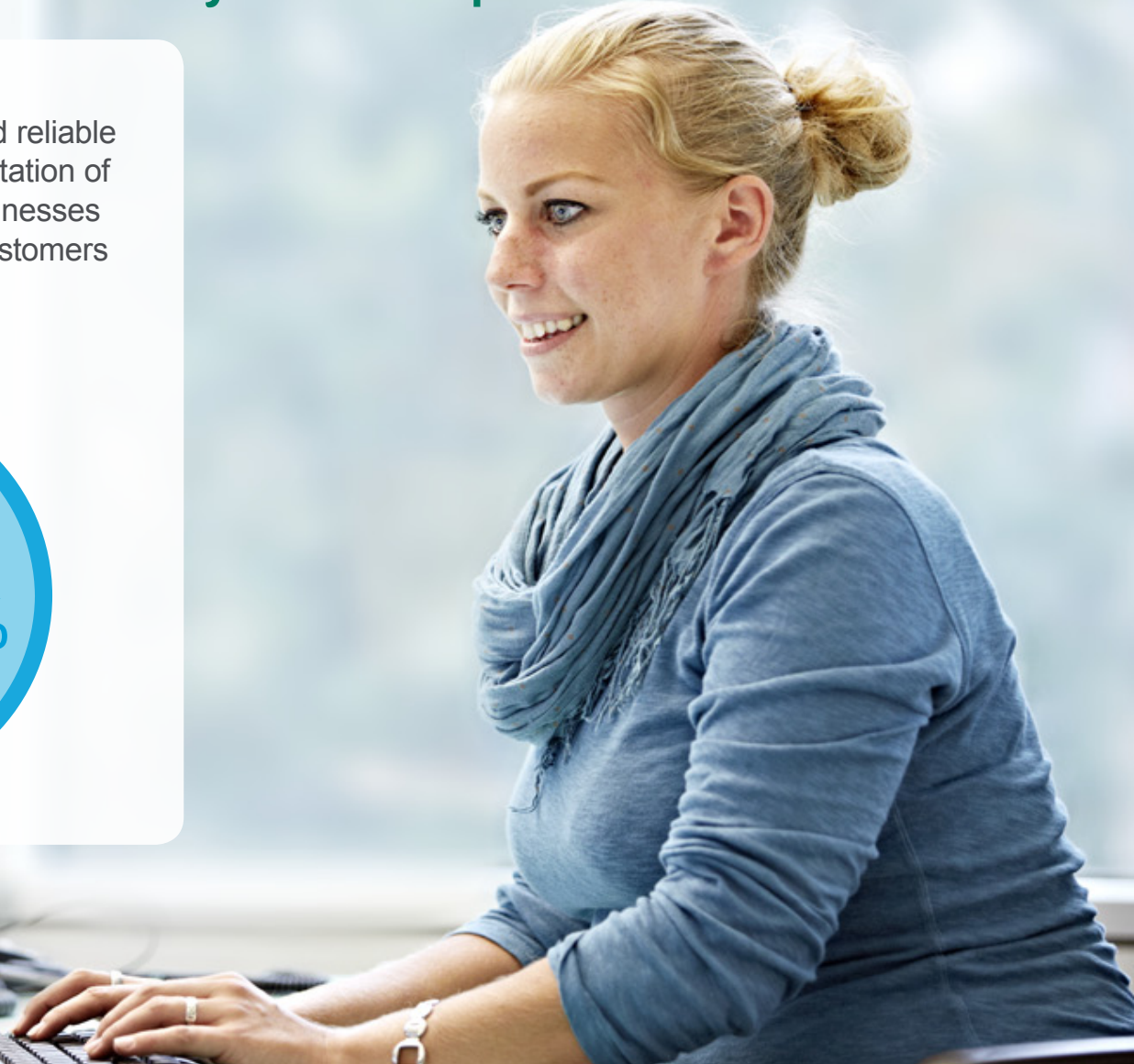
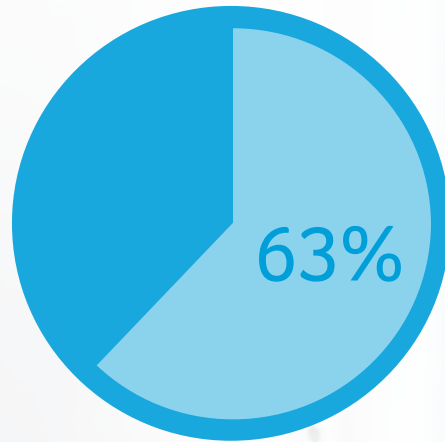




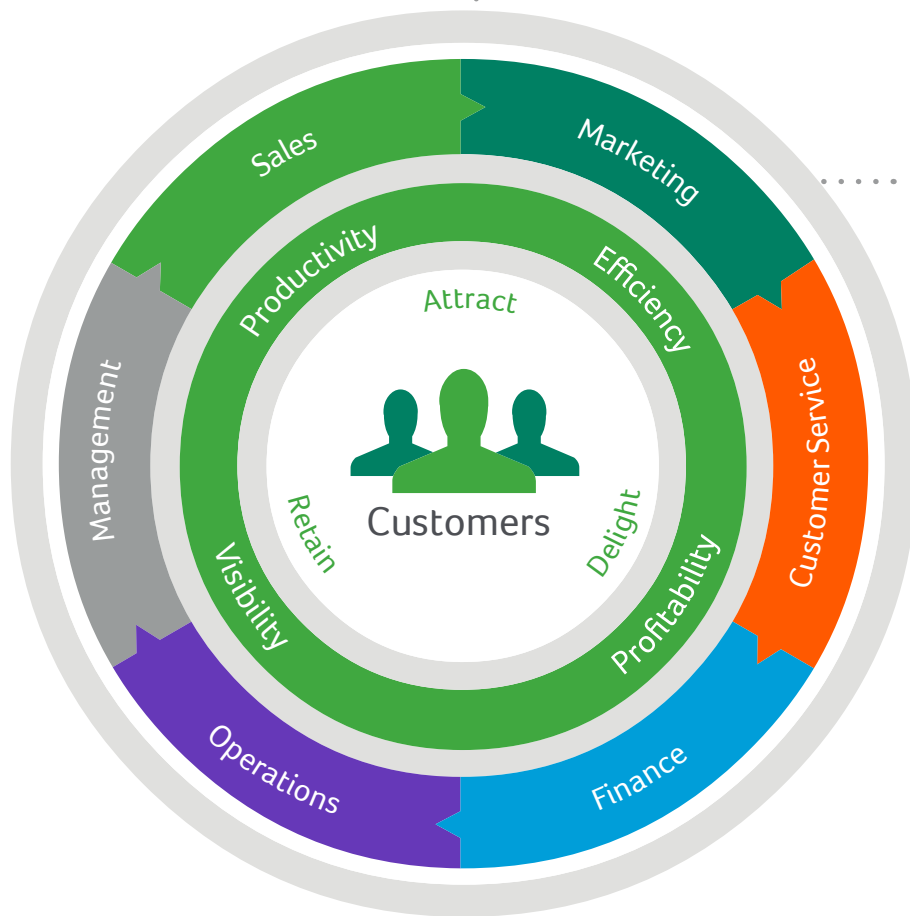
## 5. Six ways you can benefit from a joined-up business

In a 2013 Sage European survey of small and medium sized businesses, 63 percent of customers identified consistent and reliable customer information as a key benefit following the implementation of an integrated Sage CRM and Sage ERP solution. These businesses experienced end-to-end visibility and a single view of their customers as a result.

Consistent, reliable  
information across the  
business is a key  
benefit of an integrated  
Sage CRM and Sage  
ERP solution



## Success starts here



- 1 Transform customer experience**  
Resolve queries more quickly and personalize your response, driving service team productivity and increasing customer satisfaction levels
- 2 Market more effectively**  
Devise more targeted campaigns based on real customer information, delivering a better return on your marketing spend
- 3 Make people more productive**  
Avoid duplicating work and make your teams more productive. Employees with access to systems that work together spend time growing the business rather than fire-fighting problems
- 4 Work faster & smarter**  
Connect communications between different departments underpinned by an automated workflow that seamlessly connects each customer interaction
- 5 Use visibility to drive profitability**  
Get one central view of all your customer activity, giving you the critical information you need to make informed decisions and run a successful company
- 6 Pitch products to the right people**  
Leverage reliable customer data to target customers that are the best fit for new products or services and devise marketing strategies to catch their attention

## 5.1 Transform the customer experience

With an integrated CRM and ERP solution, your business can transform the customer experience

With a complete view of CRM and ERP interactions across the entire customer lifecycle, customer service can resolve queries faster and personalize their responses.

For example, a customer service representative may have to deal with a request from a customer for a replacement part. They have a better view of existing stock levels, she can use this information to explain to a customer when their part will be available. He or she can then document the outcome of this call in your company's CRM solution.

This will decrease call resolution times and improve customer relationships.



## 5.2 Market more effectively

With an integrated CRM and ERP solution, companies can devise more targeted campaigns based on real customer information, thus delivering a better return on their marketing budget.

For example, your marketing team can create a more focused and relevant mailing lists by segmenting customers based on the frequency and value of their orders. They can then develop campaigns that maximize opportunities with high-value customers. And they can market surplus stock (as identified by your ERP solution) at customers who previously bought similar products.





## 5.3 Empower productive employees

Employees can avoid duplicating the work of others and become more productive with an integrated CRM and ERP solution. If employees have access to tools that work together, they can spend time advancing the business and not duplicating existing work or fire-fighting problems.

For example, your customer service team can document answers to common questions about delivery requirements. Sales can in turn act on this information to improve future sales cycles and better inform customers about these requirements prior to an order. This should, in turn, reduce the volume of calls customer service receives from customers about their orders.



## 5.4 Work faster and smarter

Your business can become more efficient by using automated processes that connect one department or customer interaction to the next. Consistent data can underpin how you engage with customers as they move through the process of receiving a quote, making a purchase, arranging shipping and paying an invoice.

For example, a business can configure the automatic sharing of financial information between sales and accounts so both departments know where customers are in their billing cycles. And they can use this information to decide on an approach before making contact with a customer.



## 5.5 Use visibility to drive to drive profitability

It's easier to identify sales patterns and cross-sell opportunities if you have business-wide insights into the volume and value of trade.

You can spot customer tail-off and take measures to address this before business is lost. Similarly, you can convert key performance data across multiple processes into easy-to-understand reports and identify opportunities to fine-tune financial performance and, ultimately, boost growth.

For example, if there is an identified delay in your existing inventory, your sales teams can concentrate on selling other products and services unaffected by this delay. Acting on this degree of visibility, you can take action to address issues with your supply chain and seek to improve fill-rates across the company.



## 5.6 Pitch products to the right people

With the right data, businesses can leverage customer information to match products and services with specific customer groups.

For example, a business manager should be able to analyze the company's costs and sales statistics within their integrated CRM and ERP solution and then decide what type of products to develop or ship next. He or she can then provide information to the sales department. They, in turn, can cross-sell relevant products to existing customers. Alternatively, a sales rep can use this information to determine if he or she should upsell after a customer makes a new purchase.

**In the next chapter, we describe five key business areas that benefit directly from an integrated CRM and ERP solution, and we provide specific examples of companies who are experiencing these benefits.**





## 6. Five areas that will benefit from a CRM and ERP solution

Every company depends on a mix of employees with various skills. A sales executive, for example, brings a different range of skills and requirements to a company than a financial controller. A sales executive requires a solution for recording sales and customer information, whereas an accountant requires a tool for budget forecasts. The strength of an integrated CRM and ERP solution is that it bridges this divide and facilitates both roles.

Your employees can use accurate, up-to-date and relevant when they interact with customers, and this information represents a high-value asset regardless of a person's role. Similarly, employees don't have to waste time exporting data from disparate systems to give others the critical information they need.

**An integrated CRM and ERP solution impacts on people at all levels in your business. In this section we explain how this type of solution affects five core business areas.**



## 6.1 Management

A central view of customer activity gives senior management the critical information they need to run a successful company. They can make decisions based on having visibility over staff productivity, sales forecasts, sales performance (by rep if necessary) and visibility over where deals are in the pipeline.

As a manager, if you have this information on a single dashboard, you can ensure the right balance between business development, profitability, and cash flow. Drilling down into departmental data – from quotes and billing to after-sales service – provides you the basis for reports that offer a comprehensive view of business performance; and it should also expose risks and opportunities. This means you can make more informed decisions and steer your business in the right direction.



American Pool Enterprises is based in Maryland, USA. It provides swimming pool services to a broad customer base that includes health and fitness clubs as well as homeowners.

Previously, Chief Information Officer Karen Snyder found it difficult to give management the information they needed in a timely manner because of manual processes and disconnected information. Following the deployment an integrated CRM and ERP solution, Snyder was able to report more effectively to management, and American Pool Enterprises made significant cost-savings as a result.

“

“Man-hours are where the savings are coming from. We have been able to streamline so many processes that used to take people hours,” says Karen Snyder, Chief Information Officer with American Pool Enterprises.

“You realize how powerful it is when an executive comes and asks you to track something within the business and you can turn it around for them in 30 seconds.”

”



## 6.2 Sales

An integrated CRM and ERP solution gives sales people access to information they need, when they need it. Your sales team can find pricing and finance information even if finance team members are unavailable or if it's outside office hours. And a connected solution facilitates up-to-date product catalogs and cross-sell opportunities, shortening the time it takes to turn a prospect into a customer.

By reviewing ERP data within CRM (e.g. historical sales orders, cases or invoices), sales people have the knowledge they need to close deals. Your sales teams will also be able to manage customer expectations about delivery times because they have access to stock level information.





DES is a wholesale print supplier of equipment and consumables in Australia. It transformed its sales and service roles by linking the customer facing teams with the finance department.



“We get customer information coming right through to the sales staff without them having to access the ERP system,” says Chris Gallen, IT Manager with DES. “It brings information and business process workflows all the way through from the customer end – the order entry and the service side – back into the business for billing.”



Chris Gallen  
IT Manager  
DES



<http://bit.ly/DESVideo>

## 6.3 Marketing

Your marketing team can mount more effective campaigns and maximize its budget with an integrated solution. With access to key customer information, your marketing team can execute highly-targeted promotions at new and existing customers, for example promoting overstocked items or a new product that matches a customer's buying history.



Widex, the Chinese subsidiary of a Danish manufacturer of hearing aids, has been based in Shanghai since 1998, and it employs 127 people. Thanks to Sage CRM, the company now understands users and prospective customers in a way that wasn't possible when it relied solely on spread sheets.

“

“Sage CRM helps us tailor campaigns that are a lot less wasteful than advertising,” says Steen Teisen, Chief Executive Office of Widex. “We can make sure relevant customers are alerted when one of our road shows visits their area, for example, or we can send [customers] information that suits their profile.”

”



## 6.4 Customer Service

A joined-up solution empowers customer service teams to handle queries and complaints more effectively.

By matching a complaint to an order or an invoice, your customer service teams can initiate more informed responses and resolve problems quicker. Customer service teams can also identify valuable customers, and, if needed, refer to sales to nurture these relationships. This reduces the risk of long-term damage to relationships your company has with customers.

After Lincoln Waste Solutions combined Sage CRM and Sage ERP and streamlined access to its data internally, it reported a 40 percent increase in the efficiency of its support services.

“

“Previously, incoming customer queries could only be dealt with by looking through disconnected spread sheets, documents and billing software,” says Jay Lentz, Client Development Executive with Lincoln Waste Solutions. “Now it’s all on one screen which makes our people much more productive.”

”

**LINCOLN**  
WASTE SOLUTIONS, LLC



## 6.5 Finance

With end-to-end visibility, your company's finance department can drive better business performance across sales and marketing, billing, debt collection, and stock control. And your CFO should be able to evaluate what's coming in and out of the business and adjust budgets and forecasts as a result.

An ERP solution should remove the need for the manual processing of orders and invoices, thus freeing up a finance team to focus on alternative value-adding tasks. Similarly, a CRM solution enables sales and accounts to work together on payment processing and credit control.



The Australian Grand Prix Corporation facilitates the holding of Formula One and Motorcycle Grand Prix events, handling everything from ticket sales to the actual race day. General Manager Jeremy Kann wanted an integrated Sage CRM and ERP solution to replace manual processes.

“

“The margin for error was too great and we just felt we wanted to streamline our entire operations, linking sales to finance,” says Jeremy Kann, General Manager with the Australian Grand Prix Corporation.

“Whole processes have been eliminated. You enter information once and finance spit it out as an invoice. Because it had been manual on both sides, reconciliation took much longer. Now it’s fully automated and so much easier.”

”



## 7. Conclusion

As the manager or owner of a successful company, you already spend time considering business strategies that can increase productivity, improve efficiencies and help your business realize its goals.

You may have already deployed an ERP solution to improve the quality and efficiency of your business. However, you may not have had time to consider the benefits of integrating your ERP solution with CRM.

This type of integration doesn't have to be complex or expensive, and it will drive your business forward. The customer stories and research findings described in this eBook highlight how an integrated CRM and ERP solution can benefit marketing, sales, customer service and finance departments, in addition to management teams within your business.

Companies all over the world are already using integrated CRM and ERP solutions. They are all experiencing the benefits of more accurate information, reduced paperwork, better connected data and more efficient business processes.

**Is your business ready to take the next step?**



## 8. How Sage can help

Sage has been working with small and medium sized companies for over 30 years. We have helped thousands of businesses to acquire, retain and delight their customers and achieve their business ambitions.

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, increase their business productivity, and make every customer interaction count.

Sage CRM is used by successful, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to grow their business.

When combined with Sage ERP, our customers enjoy better business insight, greater efficiencies and productivity, and 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.



Keep up to date at  
**sagecrm.com**





The Sage Group plc is a leading global provider of business management software to small and medium sized companies, creating greater freedom for them to succeed. Sage understands how and why each business is unique. We provide products and services that suit varying needs, are a pleasure to use and are secure and efficient. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and entered the FTSE 100 in 1999. Sage has over 6 million customers and more than 13,380 employees in 23 countries covering the UK & Ireland, mainland Europe, North America, South Africa, Australia, Asia and Brazil. For further information please visit [www.sage.com](http://www.sage.com).

