**CUSTOMER**
Metrohm-Peak

**INDUSTRY**
Laboratory equipment distribution and services

**LOCATION**
United States

**SYSTEM**
Sage Accpac ERP
Sage CRM

# Metrohm-Peak Chooses Sage Software CRM and Accounting Solutions

### New Company, Increased Challenges

A recognized leader in ion chromatography instrumentation and advanced analytical chemistry services, Metrohm-Peak was founded in 1991 as Peak Analytical. In that year, Jeff M. Brewer set up shop in a small rented office in Houston, Texas, with two ion chromatography instruments and an ambitious vision for his business. After nine successful years, Peak Analytical joined forces in April 2000 with the Swiss-based Metrohm, Ltd. to form Metrohm-Peak, Inc.

Several formidable challenges arose from this merger between two leaders in a fast-growing market. The newly formed company was unprepared to manage requirements for multicurrency support and serialized inventory, and faced item-costing and invoicing issues resulting from the merger. In addition, existing systems were based on time-consuming and error-prone manual processes that were a barrier to corporate growth.

Metrohm-Peak entered 2001 with aggressive plans to increase sales 20 percent by 2002 and a goal to significantly increase

their market share by 2003. Their most challenging obstacle to growth was the lack of a well-integrated and company-wide information source for their sales, marketing and customer service divisions. Metrohm-Peak knew they could not afford to continue with "business as usual."

### Integrated CRM Promotes Proactive Service, Sales, and Marketing

After considering several competing solutions, Metrohm-Peak selected Sage Accpac ERP and Sage CRM running on Microsoft SQL Server to provide a centralized customer resource management and accounting system that could meet their various requirements. They turned to Houston-based Advanced

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**CHALLENGE**

Metrohm-Peak needed to implement a streamlined system for company-wide communcations and global business processes.

**SOLUTION**

Sage CRM and Sage Accpac ERP run on a Microsoft SQL server and provide a Web-based, integrated solution for Metrohm-Peak's marketing, sales, service, and accounting needs.

**RESULTS**

Metrohm-Peak is able to increase sales productivity, give remote users access to synchronized data, and support multilingual, multicurrency accounting transactions.

**sage** software
*Your business in mind.*

Applications, Inc., for help implementing this integrated CRM solution. Certified consultants for both Microsoft and Sage Software, Advanced Applications successfully guided Metrohm-Peak through the entire implementation process in less than a month.

Accessed through Microsoft Internet Explorer 6.0 on Microsoft Windows 2000 or Microsoft Windows XP, Sage CRM and Sage Accpac are both completely Web-deployed, enabling Metrohm-Peak to manage all aspects of marketing, sales, service, and back-office financials using a single interface. While on the road, the sales force uses laptops synchronized to CRM via Solo Synch. The laptops are loaded with CRM Solo, Microsoft SQL Server Personal Edition, Microsoft Windows 2000, and Microsoft Office. These remote clients use the advanced replication features of Microsoft SQL Server to copy and synchronize data with the central server.

Metrohm-Peak selected their CRM-based solution in part because of the high level of compatibility between Sage CRM, Sage Accpac, and Microsoft products. "Metrohm-Peak was already a Microsoft shop, relying heavily on the full suite of Microsoft Office products, along with Microsoft Publisher and Microsoft Outlook," observes Scott McMillian, CEO for Advanced Applications, Inc. "Sage Software products were just a natural fit."

Seamless integration between Sage Software and Microsoft solutions has enabled Metrohm-Peak to centralize their disconnected information, address inventory issues, and automate manual processes. The intuitive Sage CRM system empowers all departments to take a proactive approach to service and sales through a single view of the customer—allowing them to create and maintain the relationships critical for customer retention.

Prior to installing Sage Accpac, Sage CRM, and Microsoft SQL Server, the sales group could only gather extremely limited data on customers in the field. Attempts to synchronize data centrally so that others could benefit from customer information often failed, causing sales staff to maintain separate databases disconnected from the rest of the company. Forecasting, commissions, and reporting were time-consuming and inaccurate manual processes. The inability of the existing system to address inventory issues, such as multicurrency, serialized inventory, warranty, and RMA-tracking made manual adjustments a common and expensive reality.

"Each department from sales and marketing to receivables and customer service kept its own information," says Jeff Brewer, CEO of Metrohm-Peak, Inc. "With separate databases of information throughout the organization, individuals were forced to

perform tasks without working from a consistent view of our customers." As a result, customer service and sales were under-achieving, and analysis, reporting and forecasting were insufficient for the company's needs. Equally important, the company simply was unable to deliver the high level of service they wanted to provide their customers.

With their new Sage CRM solution, Metrohm-Peak employees can now access company information from anywhere with a Web browser, facilitating real-time transactions such as order entry, AR invoicing, item lookup, commissions, and quoting. With this improved information flow, the sales cycle at Metrohm-Peak is now significantly shorter—access to timely and reliable sales forecasts is easier than ever, and sales productivity has begun to increase. In addition, the multilingual and multicurrency capabilities of Sage Accpac effectively addressed the company's need for globalization. Warranty, RMA, and serialized inventory problems also ceased to exist with the implementation of this completely integrated business management solution.
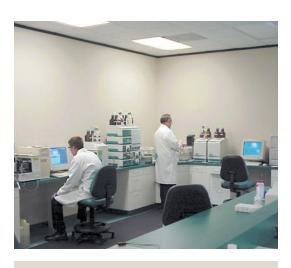
### Driving Business Efficiencies

A streamlined and shorter sales cycle can be expected to significantly increase revenue and decrease administrative costs.

"Our goal is to increase sales 20 percent this year. We want to have as much as 25 percent of the overall market by 2003. The automated workflow will make us much more efficient and my expectation of our salespeople is to spend time selling, rather than filling out paperwork. Our new Sage Software solutions will be key to achieving our goals," says Jeff Brewer. Thanks to CRM, the entire history of interactions with customers, partners—and even competitors—is available in real time from a central repository. Every interaction can be informed, proactive, and consistent.

"The process of evaluating solutions and working with Sage Software and Advanced Applications to determine our specific needs has forced us to analyze our business processes and opened our eyes to how this type of solution can help us provide the level of customer service any company would envy," Brewer points out. "Our entire company is excited about this 'new day' of automation for our business."

The CRM solution makes it easy to analyze the organization at every level. A manager can easily identify trends and recognize what's working and what's not for every enterprise, from marketing campaigns to sales territory alignment to resolution of customer support incidents. "By automating and streamlining our business, we are able to provide a higher level of service while

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> —Jeff Brewer
> CEO
> Metrohm-Peak

reducing our cost of doing business," says Kim Brewer, CFO of Metrohm-Peak. With Sage CRM and Microsoft SQL Server, employees now have access to more accurate and complete sales and service histories, allowing them to create more effective relationships with customers and ensuring that service issues are resolved rapidly.

### Fast, Efficient Implementation

Working closely with the consultants at Advanced Applications, Metrohm-Peak was able to implement their integrated Sage Accpac, Sage CRM, and Microsoft SQL Server solution in only three weeks. "I am extremely pleased with the decision to choose Sage Software and Advanced Applications. After considering several comparable systems, we felt confident that the Sage Software solution running on Microsoft SQL Server was best for us. Now that the system is up and running, we're certain we chose wisely," concludes Jeff Brewer.

### ABOUT SAGE SOFTWARE

Sage Software has been responding to the needs, challenges, and dreams of small and midsized businesses for over 25 years. With a complete range of business management solutions and services, Sage Software helps companies improve customer relationships, reduce costs, and automate and integrate a variety of operational activities. Its solutions support the specialty needs of a broad scope of industry segments, including manufacturing, distribution, construction, real estate, nonprofit, and professional services.

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