

Source Technologies Centralizes Sales and Customer Data With Sage CRM

Based in Charlotte, North Carolina, Source Technologies Inc. is a longtime Sage customer and a leading provider of Magnetic Ink Character Recognition (MICR) solutions used by a wide variety of businesses and financial institutions to encode the checks they print. Originally a hardware solutions provider, Source Technologies recently developed and began selling a web-based software product that enables customers to print checks remotely while maintaining centralized control. The new software sales strategy significantly increased the complexity of its sales process.

“When we added software to our product offerings, we realized that we could increase the efficiency and effectiveness of our sales efforts by centralizing sales and customer data,” recalls Tim Baker, Source Technologies’ director of information systems. “Until that time, this type of information was not shared across our enterprise, and we wanted to start duplicating complex software solutions to multiple customers. Data sharing also became essential.”

Sales Force Automation and Much More

To initially resolve this issue, Source Technologies implemented a sales force automation solution. But it quickly came to realize a critical shortcoming typical of this type of system: Beyond the sales process, these dedicated products do not support centralization of customer data that can be used to improve service throughout the entire customer relationship, from sales through support and even through collections.

“We wanted to give everyone in our company access to a consolidated customer record that contains up-to-date information about any given customer and all of his contacts with us,” Baker says. “We knew that if we could centralize all of this information, we would be able to increase service levels, optimize sales force efficiency, improve forecasting accuracy and inventory control, and streamline just about every other business process.”

Instant Return on Investment

Solutions Technologies considered several solutions and ultimately selected Sage CRM. “We have relied on Sage 300 ERP* accounting solutions for over a decade and have always been satisfied with their products and services, so Sage was a natural choice,” states Baker.

*Sage 300 ERP was named Sage ERP Accpac when Source Technologies Inc. initially implemented this solution. The product names have been updated in this case study to reflect current naming.

Customer

Source Technologies Inc.

Industry

Hardware and Software

Location

Charlotte, North Carolina

System

Sage 300 ERP
Sage CRM

Challenge

Source Technologies needed an up-to-date, scalable accounting and CRM solution that could handle detailed project accounting, complex sales orders, and sales data tracking and management.

Solution

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

Results

With Sage’s integrated solution, company earns immediate investment return with improved customer service, forecasting accuracy, and inventory control.

In fact, the company presently employs an in-house Sage certified consultant originally employed and trained by Jennings & Associates, Source Technologies' long-time Sage business partner. "But the real clincher was the out-of-the-box integration between Sage 300 ERP, our accounting solution, and Sage CRM. With no integration expense, this solution actually paid for itself as soon as we opened the box."

"Source Technologies recognized the potential of Sage CRM as a key element to integrate and optimize its business systems," says Ray Jennings, president of Jennings & Associates.

Indeed, integrating its CRM and accounting solutions provided Source Technologies the capability for swift and comprehensive responses to virtually any customer inquiry—from order status to progress reports to accounts receivable data. Integration also facilitated accurate forecasting of inventory information.

Additionally, every Source Technologies employee now has access to a shared database containing customer contact information and employee calendars. "With Sage CRM, we have real-time access to information about any aspect of our business," says Baker.

"The bottom line is that Sage CRM has fulfilled our initial needs for the centralized creation of an all-inclusive customer database," concludes Baker, "and continues to meet our requirements by providing our entire enterprise access to the data needed to close sales, satisfy customers, and build long-lasting relationships."

"Source Technologies is a prime example of a very productive company successfully implementing Sage integrated applications," says Jennings.

"The bottom line is that Sage CRM has fulfilled our initial needs for the centralized creation of an all inclusive customer database and continues to meet our requirements by providing our entire enterprise access to the data needed to close sales, satisfy customers, and build long-lasting relationships."

Tim Baker
Director of Information Systems
Source Technologies

About Sage

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. At Sage, we live and breathe business every day. We are passionate about helping our customers achieve their ambitions. Our range of business software and services is continually evolving as we innovate to answer our customers' needs. Our solutions support accounting, operations, customer relationship management, human resources, time tracking, merchant services, and the specialized needs of the construction, distribution, manufacturing, nonprofit, and real estate industries. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 12,300 people and supports more than 6 million customers worldwide. For more information, please visit the website at www.SageNorthAmerica.com or call 866-996-7243. Follow Sage North America on Facebook at: <http://www.facebook.com/SageNorthAmerica> and Twitter at: <http://twitter.com/#!/sagenamerica>.