sage

CUSTOMER SUCCESS

Simplifying CRM and the sales process

Nexus Solutions centralises customer data and improves efficiency with Sage 300cloud and Sage CRM.

Established in 2001, Nexus Solutions Limited is one of the leading network solutions providers in Hong Kong. The company delivers total solutions with integrated network communication, infrastructure, and internet security technologies to customers in Hong Kong, China, Taiwan, and other Asian countries.

Challenge

Nexus Solutions needed a better way to monitor and manage relationships with their customers and partners. Without a CRM system, there was a lack of understanding of customer information and co-ordination between departments.

Nexus Solution's data was managed in a disorganised fashion. The sales cycle was difficult to measure as each salesperson handled leads differently. And the lack of coordination between marketing and sales resulted in ambiguous messages being conveyed to customers and partners.

The company aimed to consolidate its disparate data, achieve better coordination between its marketing and sales departments, and establish a platform for rapid customer acquisition and retention.

"With the implementation of a CRM system, we are hoping to enhance the departments' transparency and better monitor our relationship with customers and partners," says Astley Yip, Sales Manager at Nexus Solutions.

Company
Nexus Solutions Limited

Location
Hong Kong

Industry
IT

System
Sage 300cloud and Sage CRM

Partner
Data World Solutions

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Astley Yip, Sales Manager, Nexus Solutions

"It was imperative that we implement a CRM system. Not only would the CRM help us to better understand our customers' needs and heighten the transparency of the sales cycle, it would also showcase our relationship with our multinational partners, from whom we rely on to provide quality solutions to our clients," she says.

Choosing Sage

With the help of Sage implementation partner Data World Solutions, Nexus Solutions evaluated several CRM systems.

"When looking for a compatible CRM solution, we needed one that was reasonably priced, flexible, offered local support together with tailormade customisation and comprehensive reporting tools," says Astley.

Nexus Solutions realised Sage could deliver these benefits, so the company chose an integrated solution of Sage 300cloud with Sage CRM.

The company was particularly attracted to the web-based functionality of the solution.

"Most CRM systems have similar features and functions. However, the feature that attracted our attention was its ability to offer remote-access with security technology such as SSL-VPN. Its web-based feature allows our salesmen to access and update Sage 300cloud and Sage CRM anytime or anywhere without having to install any additional applications," says Astley.

A smooth implementation process

With the help of Data World Solutions, the combined Sage 300cloud and Sage CRM solution was implemented for 20 users, within three months.

There were several challenges facing Sage and Data World Solutions prior to implementation. Nexus Solutions needed to consolidate data from thousands of Excel spreadsheets. There were concerns confidential information could be revealed to unauthorised personnel. And some users feared having to spend time inputting data into the CRM.

Data World Solutions overcame all these challenges during the implementation. All disparate data was standardised in a web server. To prevent unauthorised data access, Sage CRM's built-in security functions were enabled. And Data World Solutions provided training to help Nexus Solution's employees understand the CRM, strengthening their confidence in the system.

"Having used a customised Sage CRM from Data World Solutions, we were satisfied with the solution and service provided and believed in its professionalism to integrate the existing Sage CRM with Sage 300cloud, which enhanced the cost-effectiveness," says Astley.

Results

An integrated Sage 300cloud and Sage CRM solution has helped Nexus Solutions better understand customer needs, increase transparency of the sales cycle, and improve its relationship with multinational partners.

Improved customer service

Being a customer-centric solution provider, it was critical for Nexus Solutions consultants and support staff to register customer issues and concerns.

Thanks to Sage CRM, the company now has a centralised bank of customer and partner information. This allows customer service to respond to queries in a more quick and efficient manner.

"Since its implementation, I got several comments from our clients that they seem to be better satisfied with our support service as we answer their needs quicker and in a more efficient manner," says Philip Leung, Network Consultant at Nexus Solutions.

A more integrated and efficient marketing and sales engine

With data centralised and accessible online through Sage 300cloud and Sage CRM, it's now easier for sales people to monitor sales pipeline, forecast business development activities, and analyse sales cycles.

Nexus Solutions were impressed with the standardisation of lead processing which has led to more coordination between sales and marketing. The combined Sage 300cloud and Sage CRM solution provides a rule-based procedure that alerts sales reps when a new lead is assigned to them by marketing.

Supervisors can now easily track outstanding leads, including those not followed-up within an hour of being assigned, thus preventing loss of business and accelerating efficiency. Coordination between sales and marketing also improved as both departments now use Sage 300cloud and Sage CRM, helping facilitate coherent marketing strategies and events.

"All communications between prospects and clients are recorded in Sage 300cloud and Sage CRM and the results started to surface soon after the implementation. The loss of customers reduced greatly and our marketing efforts achieved a much higher response to our surprise," says Astley.

"Through the user-friendly reporting tools and target list generation functions, we can now painlessly extract the target database from Sage 300cloud and Sage CRM."

"Although it was difficult to motivate the staff to enter every transaction with customers and partners in Sage 300cloud and Sage CRM, the ease of retrieval of the information, analysis and details has encouraged its use. Now, Sage 300cloud and Sage CRM has become indispensable at Nexus Solutions," says Yip.

"Its web-based feature allows our salesmen to access and update Sage 300cloud and Sage CRM anytime or anywhere."

Astley Yip, Sales Manager, Nexus Solutions

About Sage

Sage (FTSE: SGE) is the global market leader for technology that helps businesses of all sizes manage everything from money to people – whether they're a start-up, scale-up or enterprise. We do this through Sage Business Cloud - the one and only business management solution that customers will ever need, comprising Accounting, Financials, Enterprise Management, People & Payroll and Payments & Banking.

Our mission is to free business builders from the burden of admin, so they can spend more time doing what they love – and we do that every day for three million customers across 23 countries, through our 13000 colleagues and a network of accountants and partners. We are committed to doing business the right way, and giving back to our communities through Sage Foundation.

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About Data World Solutions

With more than 20 years' experience in the IT industry, Data World Solutions Limited is a one-stop IT solution provider specialising in Accounting, Financial and Distribution Management, Enterprise Resource Planning, Customer Relationship Management, e-Business, Internet Infrastructure, Enterprise Security, LAN and WAN Networking and Integration. Data World's team of professional technicians and consultants provides best-of-breed IT solutions to a range of clients across Asia Pacific, from multinational corporations to SMBs.

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Expert in Business Management Solutions