

Sage CRM helps American Pool Enterprises manage 21 offices and a supplemental workforce of 5,000 employees



Customer

American Pool Enterprises Inc.

Industry

Leisure

Location

Maryland, USA

Solution

Sage CRM

Anything to do with swimming pools, American Pool Enterprises Inc. (APEI) will have it covered. As a leader in construction, maintenance, repair and renovation, lifeguarding and recreational facility management, it has built up a broad customer base that includes health and fitness clubs, condo and homeowners, hoteliers and public sector aquatic facilities.

A series of acquisitions propelled the company into a period of sustained growth resulting in 21 offices across the country that presented a logistical challenge to the headquarters in Maryland.

The business challenge

For Karen Snyder, APEI's Chief Information Officer, the biggest challenge was consolidating all the information from the different sites. Each office was set up with its own infrastructure, servers and database software that trapped information in silos, disconnected from the wider organization.

"As we grew larger it got harder to consolidate our data and report our numbers to our executives," explained Snyder. "I had to dial in to each server every night. It was a painful and time consuming process and by the time I could present the data it was already old."

There were other challenges. The sales team was using Excel spreadsheets independently of each other, which made it hard to keep track of how many bids were out in the market at a given time, let alone the status of existing customer relationships.

Another administrative headache was the seasonal recruitment of lifeguards. During three frenetic months in the summer, 5,000 people supplement the full-time workforce of 250, a massive HR challenge in terms of recruitment, work scheduling and training.

'Man-hours are where the savings are coming from. We have been able to streamline so many processes that used to take people hours'

Karen Snyder,
Chief Information Officer,
American Pool Enterprises Inc.

Challenge

Managing wide ranging customer services with the added pressure of seasonal and regulatory demands was proving difficult for a business spread across 21 sites with silos of disconnected information.

Solution

Sage CRM provided a centralized source of accurate and up-to-date information, which helped to streamline processes and increase efficiencies while giving executives better visibility of a complex business.

Results

Dramatically reducing the time and money spent on administrative tasks and significantly improving visibility of the business, Sage CRM has made American Pool Enterprises Inc. more efficient and helped drive growth.

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Karen Snyder,
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Hiring lifeguards has to adhere to strict guidelines, part of an ongoing compliance challenge faced by APEI. A highly regulated sector, new health and safety rules are frequently rolled out at very short notice.

Snyder knew that APEI needed a CRM (Customer Relationship Management) system to give the business the visibility it needed across multiple sites and multiple processes. Crucially, it would centralize information, providing a single source of data that would be available to the different lines of business in real-time.

The company was already using a Sage accountancy product and planning an upgrade to Sage 300 ERP. The option of a CRM package that could easily be integrated with its new Sage ERP system made Sage CRM a natural choice.

Karen Snyder chose Sage CRM for seamless integration with their accounts, but there were other deciding factors. Out of the box it had the functionality that APEI needed; it was intuitive to use and it could be run on-premise. “We looked at all the different players but decided on Sage CRM because we could retain full control over it. I was very fearful of Software-as-a-Service vendors who can decide when they want to run an upgrade. They could do it in my busy season, break my product and there would be nothing I could do about it,” she explained.

The cost and complexity of other products also helped make up her mind. She bought Sage CRM with over 200 licenses and a self-service component used by the lifeguards. Run off servers in its Maryland headquarters and distributed over the company’s IP network to outlying offices, users access Sage CRM through a browser, a familiar interface that helped gain acceptance, particular among younger employees used to using the internet.

Training was still vital, according to Snyder, who ran a roadshow to give all end users the chance to ‘touch and feel’ the new product. Every subsequent software tweak is accompanied by online documentation and webinars.

Sage CRM has quickly become a central hub for all of APEI’s business, a repository for diverse and complex processes and procedures that had previously been difficult to track. “We can look at records to make sure pool inspections have been carried out; check to see who is working where at any given time; look at the bids that are out and the money that is owed,” she said.

The software also helps APEI make the most of sales opportunities across its diverse business portfolio. Access to pipelines, calendars, sales reports, and contacts provides instant and accurate insights, from bids through to sales.

The business benefits

One of the main reasons for buying Sage CRM was to give the business better visibility of its diverse services. Having a central repository of information available in real-time has helped APEI consolidate geographically dispersed operations to become more swift and agile. “Man-hours are where the savings are coming from. We have been able to streamline so many processes that used to take people hours,” said Karen Snyder.

Built-in features combined with easy customization have allowed APEI to address lots of different business challenges. “The customization is good but Sage CRM came with such a base block of useful features that I felt I was already 20 steps ahead of where we’d been,” she said.

When changes are required, Snyder has no problem implementing them herself: adjusting fields to incorporate pool measurements, for example, or delivering a new type of report to the board.

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In another area of the business, a self-service portal eliminated a lot of the pain points around the seasonal workforce. Lifeguards from all over the world can now apply online and upload their relevant certification, cutting out postal costs and saving hours spent re-keying information. If they get the job, they get their work schedule and training through the same system.

There have been other benefits

- Customer service has improved with issues resolved more quickly, leading to a steady rise in satisfaction ratings
- Upgrades to the system and process tweaks are managed centrally and rolled out seamlessly, a big change from trying to manually keep 21 sites up to date
- Features and functionality are continuously added at relatively little cost, much of it implemented internally because the software is so easy to customize
- Keeping compliant is easier because fields in the system can quickly be adjusted to incorporate new regulatory requirements

More sophisticated customizations have helped speed up other process. A field application lets supervisors file a report into CRM when they are carrying out a pool inspection. The data is automatically sent on to the customer by email.

Going forward, the plan is to explore the marketing tools that are integrated into Sage CRM, targeting customers with specific service offerings as opposed to blanket email hits.

Karen Snyder is delighted with Sage CRM and has no problem recommending it to other businesses. She said it has contributed to the company's ongoing success but also measures its impact on a more personal level. "I used to spend half my days gathering and presenting data. Now I can use that time more productively to help the business grow," she said.

About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain 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.

Accelerate your business success with a free 30-day trial at www.sagecrm.com

