

Sage CRM helps Hydronix see the bigger picture



Customer

Hydronix

Industry

Manufacturing

Location

UK

Solution

Sage CRM

Established in 1982, Hydronix is the preferred choice for manufacturers in the concrete, aggregate and asphalt industries. The company has installed over 50,000 systems worldwide, which help leading manufacturers in animal feed, grain, sugar and other industries reduce costs.

The Business challenge

The search for an effective Customer Relationship Management (CRM) Solution for Hydronix began four years ago when Jason Laffan, the Managing Director, recognized that the company needed a tool to enable it to build and share corporate knowledge across the enterprise.

Individuals managed their contacts and communications through Outlook and Excel spreadsheets, meaning there was no 'bigger picture'. Routine tasks were tedious and time consuming and important customer information was not easily shared or accessible.

The solution

The Hydronix team met Prior Analytics at a marketing trade show and were immediately impressed by the look and feel of the Sage CRM solution. Knowing that there was likely to be some initial reluctance on the part of users to adopt a centralized database, it was essential that the system chosen would not deter users by being fiddly and difficult to learn.

With offices in the UK, Germany and the US and a large multi-tiered reseller channel to support, Hydronix needed a web-based solution with multi territory and currency support. Sage CRM ticked all the boxes in this respect.

'The system is robust enough to handle all the demands that we place upon it and we are confident that it will support our needs for years to come'

Melany George
Hydronix

Challenge

Hydronix needed a tool to enable it to build and share corporate knowledge across the enterprise. Individuals were managing their own contacts and communications but they were missing the "bigger picture" that a Sage CRM can offer. Important customer information was not easily accessible.

Solution

Sage CRM provided Hydronix with the CRM solution that they needed. The web-based platform supports multiple territories and currencies which was vital for Hydronix and their offices across Europe and the US.

Results

The deployment of Sage CRM resulted in a quick and efficient installation, customization and user adoption. The powerful workflow system has helped support the sales and marketing teams, and it is now possible to measure sales and return on investment.

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Jason Laffan,
Managing Director,
Hydronix

Because workflow is critical to the processes in place at Hydronix, it was essential that Sage CRM provided an intuitive interface and strong reporting capabilities.

“Initially, we found the idea of scoping the system quite daunting,” said George who is responsible for the CRM system at Hydronix.

“Prior Analytics worked closely with us to develop a step-by-step deployment plan which gave us confidence from the outset of the project that we could start with the simpler elements and develop the solution over time.”

Hydronix took the bold step of signing a contract with Prior Analytics at the start of the economic downturn when many other companies were resisting making any sort of investment in strategic IT. Jason Laffan states that “This is a decision that we have not regretted now that the enquiry level has significantly increased again, and personally I have found it to be a completely invaluable tool when I am working from outside the office”

The benefits

Prior Analytics worked with Hydronix to adopt a ‘train-the-implementer’ approach to deploying Sage CRM. The implementation was scoped into distinctly phased sections.

Firstly, the data was migrated from Outlook to Access and a huge cleansing exercise was undertaken so that the new system would be populated with accurate, de-duplicated data. The immediate benefit was that users were quickly able to find up to date and accurate contact information stored in one place.

The next phases involved designing and building workflow elements to guide and support the sales process. Leads are assigned and passed out to the various tiers of resellers in different countries automatically by email (one click) and are then acknowledged back. Custom screens show all leads that have been passed out to a particular recipient and all the opportunities that they have generated.

Hydronix were able to take ownership of its new system quickly following a three-day administrator training course conducted by Prior. Melany George finds the administrative functions of Sage CRM easy to navigate and, in particular, comments that “The WYSIWG interface is of real benefit as it is easy to configure a new field or change a screen on the fly allowing the system to adapt quickly to any changes requested by the business teams”

User adoption came earlier and with more ease than expected. This is largely attributed to the fact that Sage CRM is incredibly easy to navigate from day one. Indeed, Melany George reports;

Melany George said, “the German team started to use the system competently from the outset before they had been provided with any formal training – all we needed to do was have a phone chat to give them some basic guidelines on our own customization of the system.”

Initially, the security in Sage was fairly locked down as the individual territories were nervous about allowing each other to have access to their respective data sets. However, as teams realized the benefits of sharing data, this security was relaxed.

Having much needed access to vital information has made everyone’s working lives easier. Users can now go on holiday and relax in the knowledge that their peers can manage their accounts in their absence.

“Even people who were reluctant to adopt the system, saying that it would just make their job more difficult and time consuming are now happily using CRM and are even providing suggestions on how to customize it to make their jobs easier.”

The next phase in the project was to provide the customer service and support team with access to Sage CRM. From this perspective, it’s very helpful to be able to see which resellers encounter issues with which of the five very technically complex products that Hydronix provides.

Neal Cass who manages the support side of the business explains: “The data derived from the support system can be used to identify if there are genuine issues with a particular product or whether it’s simply a case that more training is required.”

As the UK office deals with support from all over the world, a screen has been developed which gives a read only link into the repairs system. Anyone can now see the status of any repair in real time and no longer have to wait for the UK to ‘wake up’ to update them.

The marketing team at Hydronix has benefited from being able to see exactly where its budget is going.

Whenever a lead is converted, it is now clearly visible where it derived from, and it is possible to measure the return on investment from each trade show and event.

The future

Prior Analytics continue to work closely with Hydronix to continually expand and develop the system. The latest phase has built a link with the Lakeview accounts database to show account balances, credit limits and drill down to invoices.

“Prior have been amazing. There’s nothing that I’ve asked them that I’ve been told I can’t do,” says Melany George.

“The system is robust enough to handle all the demands that we place upon it and we are confident that it will support our needs for years to come”.

Solution overview

- A web-based system which supports multiple countries and currencies
- Quick and efficient installation and easy customization to meet the customer’s needs
- An easy to use system which has led to good user adoption
- Powerful workflow supports the sales process
- Excellent ongoing support from Sage Business Partner Prior Analytics

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

