

Southern Metropolitan Cemeteries Trust invests over AUS \$1 million in a Sage ERP and Sage CRM solution



Customer

Southern Metropolitan Cemeteries Trust

Industry

Cemetery and Funeral

Location

Victoria, Australia

Solution

Sage 300 ERP and Sage CRM

Southern Metropolitan Cemeteries Trust, formerly known as Necropolis, is the leading provider of cremation and burial services within the state of Victoria. Renowned for its prudent cemetery management expertise, Southern Metropolitan manages four of the largest cemeteries within Victoria, including Springvale Botanical cemetery, St Kilda cemetery, Dandenong and Melbourne Cemetery. As of 1st March 2010, the trust acquired four other cemeteries including Brighton and Cheltenham.

In 2009, the business experienced significant growth, with an increase of 7.5 percent in funerals, along with a further 14 percent increase in after funeral functions.

To align with its future plans for expansion, Southern Metropolitan needed to develop a management system that would be suitable for use within a range of cemeteries across the country and could integrate sales and customer information with information held in the accounting system. Russ Allison, CEO of Southern Metropolitan Cemeteries Trust, said, "We were using a dinosaur legacy system to manage our accounts. There were increasingly fewer people who could support or manage it. We needed a new system that could integrate CRM into our accounting system."

'I can enter the name of a customer in the system and retrieve all the necessary information. I was not able to do this before'

Russ Allison, CEO,
Southern Metropolitan Cemeteries Trust

Challenge

After experiencing significant growth it needed to develop a management system that would be suitable for use within a range of cemeteries across the country. Additionally, the Trust wanted to integrate sales and customer information with information held in its accounting system.

Solution

Sage 300 ERP and Sage CRM were deployed. The new system was referred to as CCEM (Cemetery & Crematoria Enterprise Management) system. It handles everything from an initial enquiry, to funeral booking, cemetery location management, functions and events.

Results

The solution delivers significant benefits to Southern Metropolitan Cemeteries Trust including administrative benefits and the immediate consolidation of information and records from different systems and operations.

‘A lot of what we are doing is about generating a benefit for the future, where the reporting functions of the new system will allow us to report on sales and historical trends, as well as tracking all the attributes and interactions associated with a particular relationship.’

Russ Allison, CEO,
Southern Metropolitan Cemeteries Trust

The challenge

After spending a year trying to implement another solution, which dramatically failed to deliver, Necropolis called in the services of Oakton to evaluate which systems would meet their requirements. The selection came down to an integrated Sage 300 ERP and Sage CRM solution.

The Trust selected Enabling Victoria as its implementation partner. The Trust and Enabling Victoria designed a CRM system specifically for the cemetery and funeral industry. “We gave Enabling the difficult task of building a system that was tailored to our needs and the needs of our industry, yet allowed us to take advantage of the latest upgrades without significant upgrade costs.”

The new system, referred to as CCEM (Cemetery & Crematoria Enterprise Management) system is a relationship, booking and sales management system that handles everything from an initial enquiry, to funeral booking, cemetery location management, functions and events.

The implementation

Due to the nature and scope of the implementation, it took almost a year to deliver. As well as the system being tailored, it required almost 3 million records, some of them dating back to the 1850s, to be transferred. The key thing for Southern Metropolitan Cemeteries Trust, was that the CRM system needed to be 100 percent accurate and timely based on the extremely sensitive nature of the interactions the Trust has with customers and the industry.

“As a cemetery we are required to keep records indefinitely. Some of the cemeteries entrusted in our care go back to the 1850s. People don’t care if you maintain almost 3 million records, only theirs or their family’s matters”, comments Russ. So far they have purchased 75 licences of Sage CRM and 10 of Sage 300 ERP.

The benefits

“A lot of what we are doing is about generating a benefit for the future, where the reporting functions of the new system will allow us to report on sales and historical trends, as well as tracking all the attributes and interactions associated with a particular relationship”, says Russ.

One immediate benefit however, has been the ability to consolidate the information and records from different operations. “I can enter the name of a customer in the system and retrieve all the necessary information. I was not able to do this before the introduction of CCEM.”

Because CCEM integrates Sales with cemetery management and the accounts system, significant administrative benefits have been gained by eliminating the need for duplicate data entry. Once a record is updated in one system, the relevant information is reflected in the other systems.

The future

With the recent acquisition of four more cemeteries in Victoria, Southern Metropolitan plans to roll out CCEM to manage the operations of these new sites.

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.

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