

# Sage 300 ERP and Sage CRM deliver stellar service to Posera



## Customer

Posera, Inc.

## Industry

Software Development

## Location

North America

## Solution

Sage 300 ERP and Sage CRM

Posera, Inc. is a leading provider of point of sale software and hardware to the hospitality and restaurant industries. Based in Canada and the USA, with offices in the UK and France,

Posera serves more than 20,000 customers worldwide through a network of more than 150 active distributors. The company's flagship product, Maitre'D Software, is published in several languages. Posera's unwavering commitment to customer service and continual investment in research and development earn the company an exceptionally high 85 percent customer retention rate. Sage 300 ERP\* and Sage CRM are the solutions Posera relies on to sustain and build on its success.

## Integration is the order of the day

The company has grown rapidly over its nine-year history, measured in both organic growth and through acquisition. As it grew, the company found itself struggling to manage several different

software packages across various office locations and departments. Allen Shulman, Chief Financial Officer at Posera, recalls the situation, "We knew we needed to invest in an integrated business technology solution that would serve the entire organization. The front office was our primary concern, yet we also needed a powerful back-office ERP system."

Posera considered three integrated Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) solutions before deciding on Sage 300 ERP and Sage CRM.

"We performed a SWOT (strengths, weaknesses, opportunities, and threats) analysis involving all three solutions. In the end, we felt the integration in the Sage software solution was better. It provided the value, the feature set, and the integration capabilities we were after," Shulman says.

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Allen Shulman,  
Chief Financial Officer  
Posera

## Challenge

As Posera grew, it increasingly recognized the need for an integrated ERP and CRM solution to provide its international offices with complete, easy-to-access data.

## Solution

Sage 300 ERP and Sage CRM provide a joined up, end-to-end business management solution capable of scaling as Posera continues to grow.

## Results

The company is already realizing a 15 percent efficiency gain and saving significant administrative time. Access to sales, marketing, support, and accounting data provide Posera with a complete picture of its business and its customers.

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Allen Shulman,  
Chief Financial Officer  
Posera

#### Strategic planning pays off

The Sage Strategic Sales Group met with the Posera management team, both in person and through web conferences, to work through the company’s requirements and the details of how the software could be structured to meet them. “I appreciated working directly with the software manufacturer during the sales cycle,” says Shulman. “I knew we were getting straight answers directly from the source.” Posera has a complex business model. Some divisions work with distributors and others directly with customers. The company also sells point-of-sale hardware, so it must be able to effectively track serial numbers and warranty details.

It also provides technical support to its customers and distributors, so it requires the ability to effectively track and manage support calls and create return orders. Sage 300 ERP and Sage CRM have proven to be the ideal solution for Posera—flexible enough to handle the company’s unique business processes, with broad functionality to address all of its requirements.

#### Company wide information sharing

As an opportunity is converted to an order in the CRM module, the order is automatically created in Sales Order module. To help customer support staff deliver better overall service, the CRM module provides easy access to accounting related data such as credit terms and recent payments.

A salesperson working in Seattle can generate a service request for a customer, and the software will notify the appropriate support personnel in Montreal. That same salesperson can then monitor the support case to provide a continuity of service that Posera’s customers appreciate.

#### Monitor marketing effectiveness

Using Sage 300 ERP and Sage CRM, Posera tracks the source of every opportunity in its pipeline. “We can track a specific sale back to the trade show that generated the lead,” Shulman explains. “We can uncover how many leads that trade show generated, how many resulted in a sale, and the dollar value associated with the sales. This information helps us make the best use of our marketing dollars.”

Management has clear insight into what is in the sales funnel, can evaluate where marketing dollars are being spent, can see the effectiveness of that spending, and monitor how each member of the sales team is performing. “It’s opened that window between the accounting and sales side of the business that blends everything together,” Shulman says.

#### Measure the savings

Sage 300 ERP and Sage CRM are saving Posera time and money—data exchanged between Sage 300 ERP, Sage CRM, and other applications at Posera eliminates duplicate data entry and provides real-time information to the staff. “For example, in just one position we save about four hours a day in time we used to spend maintaining our licensing databases. Sage 300 ERP does it for us automatically,” Shulman says.

#### A comprehensive solution

In Sage 300 ERP and Sage CRM, Posera found a true end-to-end business management solution that delivers the complete customer-focused view it requires.

“We can now see our customer relationships from all angles,” concludes Shulman. “With access to aging, past invoices, open orders, new opportunities, and pending support cases, we really have a 360-degree view of our customers and our business.”

## 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](http://www.sagecrm.com)

