

CTS sees 20 per cent year-on-year growth with Sage CRM



SECURITY IS OUR STRENGTH

Customer

CTS

Industry

Security solutions

Location

Ireland

Solution

Sage CRM

Time for a change

CTS provides security solutions to both commercial companies and domestic customers nationwide, supported by a team of five engineers who travel the length and breadth of Ireland installing and maintaining systems. The company was using Sage Act! as a basic CRM system but the growth of the business and the demands of thousands of customers had outgrown the capabilities of the software.

General Manager Joe Kennedy wanted to address the challenges of running a business based around engineers who could be out of the office for a week at a time. The administration team would have to wait for them to return with the paperwork and signed orders before they could process a sale and send out an invoice.

“Cash flow was becoming a real issue for us because we can’t go about getting paid until the paperwork is back in the office. We were looking to take paper out of the process entirely and wanted engineers to be able to do the form-filling out in the field,” explained Kennedy.

There were other challenges. Paperwork would occasionally get lost or there would be errors when information was entered into the system back in the office. There was also an issue with productivity because the engineers were interrupted from their work each time they returned to the office. Ongoing inefficiencies were inevitable without a shared calendar to schedule new installations or service calls.

‘Because we can turn the paperwork around much quicker, we have seen a 100 per cent improvement in cash flow and overall productivity’

Joe Kennedy
General Manager
CTS

Challenge

Paper-based processes used by field engineers were hampering cash flow, impacting on productivity and making it hard to tick boxes around regulatory compliance.

Solution

By customising Sage CRM, CTS has addressed all the challenges with a bespoke service management solution that has transformed the way the company goes about its business.

Results

The company has seen a 100 per cent improvement in cash flow and productivity and halved the time it takes to complete its annual audit for the industry’s regulatory body.

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Joe Kennedy
General Manager
CTS

As well as the challenge of improving paper-based processes, there was the need to tick boxes around compliance. The security industry is highly regulated by the PSA (Private Security Authority) with firms selling security systems required to show a robust audit trail around customer transactions.

CTS considered a service management solution from Vodafone, but in the end it was a customised Sage CRM deployment that would solve the problems and transform the business.

Integrate to accumulate

CTS installed Sage CRM on site in its Waterford office and took 10 licenses. Out-of-the-box, the company now had much better visibility of its customers but it was the customisation capabilities of Sage CRM that were the game changer.

Sage partner DB Computer Solutions set about building the paperless mobile process that CTS wanted. The company’s maintenance contracts and order sheets were adapted and entered into Sage CRM. Information specific to the business, such as the number of sensors deployed on a customers’ site, was incorporated into an electronic form-filling process along with checklists that would cut down on administrative errors.

The diary in Sage CRM became the scheduling system for the engineers and a resource for call billing, giving administrators a bird’s-eye view of engineer availability and the jobs that had been completed.

Smartphone screens were considered too small for the forms and laptops too cumbersome, so each engineer was issued with a Samsung touchscreen tablet, connected to the 3G network with a built-in SIM card. Out on the road, they can now send back service reports and installation forms complete with captured client signatures. A simple press of an onscreen button and the PDF is dispatched to the office.

A look to the future

“It’s the easy way that Sage CRM can be customised that made it possible,” said Ian Cumiskey, Managing Director of DB Computer Solutions. “We were able to bring CTS forms into the Sage system, adding new features and

increasing efficiency by replacing a paper-based process with electronic workflow.”

CTS is seeing 20 per cent year-on-year growth and about to open a new office in Dublin. Joe Kennedy puts some of the success down to the implementation of Sage CRM.

“Because we can turn the paperwork around much quicker, we have seen a 100 per cent improvement in cash flow and overall productivity,” he said.

The shared diary has made a big difference. When clients sign a maintenance contract and select the number of callouts they want, the dates immediately generate job cards that go into the engineer’s diary. It all happens seamlessly in Sage CRM. The only time the engineers return to the office is when they come back to replenish their parts inventory.

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When a new order comes in to the office, a text is sent out to alert engineers to the details in Sage CRM. The workflow around the customer goes live from that moment. Complex processes specific to the industry are tracked automatically in Sage CRM, from storing the initial design certificates used to verify an installation to email exchanges around ongoing monitoring services.

Filing annual compliance reports has become much easier, taking half the time to produce an audit trail for the PSA. There is still a requirement to print out the paperwork in the office, but it’s more straightforward because the engineers now submit all the original documents electronically.

“DB Computer Solutions has given us a highly customised Sage CRM solution that’s right for our business,” said Kennedy. “It’s also very scalable and can grow with us. If we want to hire a new engineer we just give them a tablet and away they go. No hassle.”

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

