



CPS STAYS COMPETITIVE WITH BETTER SALES VISIBILITY

Sage 300 and Sage CRM provide real-time access to sales pipeline



Customer

CPS

Industry

Services

Headquarters

Whitby, Ontario

System

**Sage 300
Sage CRM**

CPS is a sales and service group of companies based in Ontario, Canada, that includes Control Panel Systems and Complete Packaging Systems. CPS maintains both an outside sales force and an inside team of customer service professionals who support them.

Prior to the implementation of Sage CRM and Sage 300, CPS endured widespread inefficiencies due to a lack of integration between its various databases. To remain competitive, the company realized it needed a better way to track its sales processes.

Disconnected sales databases impede progress

The highly inefficient fashion in which sales were tracked significantly threatened the growth of the company. For example, the CPS outside sales staff had no way to download the sales information contained in their mobile devices into a centralized database that could be made accessible to inside staff. Instead, data had to be rekeyed into a separate database in order to generate weekly and monthly reports. In addition, a lack of database integration meant that staff had to use a



word processor to create quotes and, when a quote turned into an actual order, had to rekey the information into the company's accounting system.

"We had a real mishmash of different programs, which really hindered our efficiency and accuracy," says Dave Beetham, general manager at CPS. "We were using a contact management program for our customer database, another database for our financial and accounting processes, Microsoft Excel® spreadsheets for other functions, and none of them were linked. Due to this lack of database integration, we had no way to access real-time data about our sales process. This meant that management couldn't effectively track our sales force and customer base."

Comprehensive, integrated CRM

To resolve its database inadequacies, CPS turned to its Sage business partner, which recommended that the company integrate Sage 300 with Sage CRM, a complete customer relationship management solution.

After viewing a demo of Sage CRM, CPS was convinced that it was the perfect solution. Sage CRM enables CPS sales representatives to synchronize their mobile devices each night and export their contact data, notes, and appointment information directly into Sage CRM through Microsoft Outlook.

In addition, internal sales staff can create quotes in the Sage 300 Order Entry module and then simply click a button to link to Sage CRM and convert quotes into orders.

Instant access to critical sales data

With the new system, all CPS contacts, as well as notes and appointments from mobile devices, reside in a centralized database.

"Recording information from sales representatives directly into the system eliminates redundant data entry needed for weekly and monthly management reports," says Beetham. "We no longer have to wait for reports because we can access this data whenever we want. Also, I can check everybody's schedule at any time."

He concludes, "Since we already had a relationship with Sage and confidence in Sage 300, it just made sense to complete our solution with Sage CRM. The implementation and its smooth integration has paid tremendous dividends for CPS. As we look to the future, we know that Sage offers the flexibility to integrate with other systems later, while keeping the price down today. Our belief in Sage and its products continues to grow as our business evolves."

"Since we already had a relationship with Sage and confidence in Sage 300, it just made sense to complete our solution with Sage CRM. It provides so much flexibility and has enabled us to conduct our business much more efficiently than before."

Dave Beetham, general manager, CPS