

CUSTOMER SUCCESS



SageCRM.com is a global solution for Quest TruTec

Many of the world's refining, chemical, and gas processing companies turn to Quest TruTec when in need of state-of-the-art inspection and monitoring services. Quest TruTec's proprietary equipment improves operational safety and minimizes down-time for its customers. Quest TruTec serves a global client base from offices in the United States, Canada, and Europe. Its customer relationship data is shared across the organization using SageCRM.com—but this wasn't always the case.

Communication Disconnect

Until recently, the company maintained five separate databases containing contacts, leads, and proposals. In addition, each technical advisor maintained their own spreadsheet or database to track their client relationships. Marc Braun, director of technical advisors, recalls the situation, "We just didn't have an organized history of the calls, e-mails, and communications with our clients. Every salesperson kept his own notes, but there was no efficient way to share that information across our organization."

Simple tasks, like locating a customer's address and phone number were complicated by the fact that the data might vary from one database to the next. With large, multi-national clients, Quest TruTec might have communication with dozens of contacts, but there was no way to associate those contacts with each other, or to arrive at a complete picture of each customer relationship. As a result, Braun says, there was always the risk that important communications and new opportunities would be lost.

World of Difference

Before selecting SageCRM.com to organize and manage the details of its client relationships, Quest TruTec also evaluated Salesforce.com, Goldmine, and ACT! by Sage. Braun says the company first narrowed its choices to Web-based systems, as they would not require the IT resources an internally-hosted solution would. "We did our math," explains Braun, "and found we could save over \$40,000 in implementation costs by choosing a Web-based CRM solution."

Braun said the decision to choose SageCRM.com over Salesforce.com was an easy one. "We use Sage MAS 200 ERP for our accounting, and we trust Sage Software products. Plus, SageCRM.com offers more features for about 30 percent less money than Salesforce.com."

Customer:

Quest TruTec

www.QuestTruTec.com

Industry:

Petrochemical

Location:

Kent, Washington, USA

Number of Locations: 4

System:

Sage CRM.com

CHALLENGE

Disparate databases spread over the company's global operations resulted in customer communication problems, and provided little visibility into open opportunities.

SOLUTION

The Web-based SageCRM.com solution provides the centralized database Quest TruTec needed. The rich feature set, ease of customization, and competitive price perfectly matched the company's requirements.

RESULTS

SageCRM.com has enabled Quest TruTec to sustain a double-digit revenue increase. A 20 percent increase in opportunity conversion rates has occurred, as well as a similar increase in revenue per technical advisor.

Rapid Implementation

SageCRM.com was up and running in less than 30 days.

“Compared with other options, the implementation was a simple process,” recalls Braun. “We didn’t require internal IT support, and the help we received from Sage Software was outstanding.”

Quest TruTec imported 4,000 contacts and nearly 150 opportunities from its various databases, and established a workflow within SageCRM.com for tracking and managing those opportunities. The centralized database eliminates the duplication of effort that used to occur, and ensures that every opportunity is managed from lead generation through completion of the project. “We had 100 percent adoption among our staff practically from day one,” explains Braun. “They immediately saw the value.”

Quest TruTec is able to customize the software to meet its specific needs. New fields are added, and other fields removed or relabeled to create a tailored workflow for lead entry and follow up.

“I’ve seen CRM initiatives fail because the cost of customizing the system was just too great,” says Braun.

“With SageCRM.com, we get just what we want. Customizations are easy to implement, and the help and support we receive from Sage Software is great.”

Leads and Opportunities

On the company’s Web site, visitors can fill out an online form indicating an interest in a product or service. The data from the form is sent directly to SageCRM.com as a new lead. Staff receive an automated e-mail notification of every new lead, and as it is worked, additional e-mail notifications of status changes.

The company now tracks every opportunity throughout the sometimes long and complex sales cycle. “Communication has improved, both internally and with our customers,” says Braun. “SageCRM.com gives us visibility into our opportunity pipeline that we never had before.”

“SageCRM.com has been an important tool in allowing us to achieve double-digit growth, while increasing our ability to serve client needs more efficiently.”

Significant Returns

SageCRM.com is saving Quest TruTec time, while delivering better information. Before SageCRM.com, management reports reflecting awarded projects and open opportunities required the staff to manually compile their results, and combine those into a single report. With SageCRM.com, those reports are available instantly.

The company is now closing 20 percent more of its opportunities. “SageCRM.com is an important tool in allowing us to achieve double-digit growth, while increasing our ability to serve client needs more efficiently,” says Braun.

Braun explains that SageCRM.com allows the company’s technical advisors to handle a larger client base, because many of the tasks they used to perform manually have been automated.

“SageCRM.com gives our technical advisors the tools they need to manage their opportunities and convert more of them into long-term clients.”

ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

