# Sage CRM Solutions Awards 2010

## Application form

**Thank you for your interest in the Sage CRM Solutions Awards**

## Most Innovative Deployment of a CRM Solution

*Innovation is one of Sage's guiding principles. Have you implemented a solution that is innovative either, for example, in terms of its implementation or type of customer?*

This form should be completed and sent along with any supporting material to Sage CRM Solutions by email at crm.feedback@sage.com or post to:

Sarah Rabett
Sage House
Wharfedale Road
Winnersh
Wokingham
Berkshire
RG41 5RD

**Please note:** The deadline date for receipt of applications is Friday 24th September 2010

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### Your company and contact details

| | |
|---|---|
| Sage account number: | 00558948 |
| Company name: | empath-e Limited |
| Contact name: | Mike Spragg |
| Telephone: | 07900 888715 / 0845 1368445 |
| Email: | mike.spragg@empath-e.com |
| Website address: | www.empath-e.com |

### Your customer's company and contact details

**Please note we will not contact the customer without prior discussion with you.**

| | |
|---|---|
| Company name: | Quanta Training |
| Contact name: | Chris Jones |
| Nature of the Business: | IT & Project Management Training |
| Telephone: | |
| Email: | |
| Website address: | www.quanta.co.uk |

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### Please provide details of the innovative implementation.

**Please include information such as the problems the customer faced prior to implementation; how you came up with the idea or sold into this area; how it addresses the customer's original problem etc...**

## Guiding the missile

Quanta are an IT and Project Management training provider and historically has been a highly sales driven organisation. The training market over the last few years has become more commoditised and competition is fierce, with many well established names falling by the way side. Quanta needed to work as smart as possible, contacting the right people, at the right times, whilst not smothering them with too much contact. But who are these people, what do they do and how do we get the contact levels right?

Quanta's SLX database included tens of thousands of Accounts and even more Contacts, how could a company with a sales driven approach possibly keep on top of this number of contacts? Who were people calling? When and why? After speaking to the sales team it was soon realised that the sales team "attempted" to remember a large amount of information, which they felt important or they put it in as part of phone call notes which were inevitably lost or forgotten about. Their decisions for calling people were highly emotionally driven and at times not particularly "intelligent", efficient or based around fact.

Quanta needed a way of creating a world-class CRM solution which would guide the "sales missile" towards the most lucrative targets or in other words increase the efficiency of the sales team, capture the required information in an easy manor and give Quanta the necessary feedback loop to ensure that this was a success. Empath-e have been integral to making this happen.

After sitting down with people from Quanta and the guys from empath-e soon analysed a number of areas where improvements could be made to SLX to improve the efficiency of the sales team.

**Breaking things down**

Being a specialist training provider in the areas of IT and Project Management the number of staff working within these areas gives Quanta a very good indication of how much potential and thus the effort which should be put into an Account. In addition Quanta has one main training facility in Worcester and accounts within 60-90 minutes of Worcester should be a prime area of focus.

To start to breakdown the mass of accounts to a more manageable number Empath-e introduced 2 new fields at an account level to record the number of IT staff and the number of Project Management staff, what is more these fields “expire” every 12 months to prompt the account team to check this information is still correct and accurate. Empath-e then used this data along with the post code region (gathered from the address postcode) to calculate the Potential of an account classifying it as Gold, Silver, Bronze or Tin.

This gave the “Quanta sales missile” direction at an Account level of where effort should be put in but it was still needed at a contact level, as some accounts could have hundreds of names and numbers. Again specialising in IT and Project Management, time and sales effort would be best focused on these departments and areas of a business. As such functionality was added to SLX giving Quanta the ability to add Departments to Accounts, including the ability to assign a contact as the head of that department or a sub-department. The ability to show this reporting structure was further enhanced within the Contact tab under Accounts where Quanta now have the ability to assign someone a department manager and control most aspects of an account via this view. This additional intelligence enables the Quanta sales team to make a more educated decision on whom to call, if a contact is responsible for a department or individual chances are they may look after those training needs...

**Bad Intelligence?**

After using this functionality for some time Quanta learnt that often the people who headed up a department may not have any training budget for example, thus the intelligence was not good. This is when empath-e went through the next level of refinement and introduced a way of marking up and categorising contacts including:

- *Attitude to Quanta* – what are their feelings towards Quanta? Sponsor; Neutral; Anti-Sponsor
- *Spend Type* – are they a budget holder? Do they allocate the budget? Are they an influencer or merely a non-buyer?
- *Expended Spend* – how much do they expect to spend on training and within what timeframe.
- *Q Amount* – how much of the expected spend do Quanta expect to receive?
- *Sales* – cleverly empath-e managed to link in with the Opportunity module of SLX, specifically the contacts involved in opportunities and if the opportunity was won, the “sales” from the opportunity were associated to that contact. In the event of multiple contacts the sales were split evenly between them.

This additional guidance was further enhanced by empath-e creating a link and showing data from two other external systems;

- *Enterprise Study* – this is Quanta’s training booking and management system. The web based system was linked to SLX and shows any courses which people are booked on or have attended. Additionally if a contact information was changed/added in either SLX or Enterprise Study this change had to be reflected in the other system, so the data was consistent.
- *Sage 50* – All invoicing is done via this Sage system and to get any idea of how much an account has spent with Quanta in any year or previous year etc. This link was essential to monitor the output of the effort put into accounts.

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**Measuring the effectiveness of targeting**

Thanks to all the development work undertaken by empath-e, Quanta had a huge amount of information available to them but the missing aspect was the return on investment Quanta was getting.  Empath-e implemented an innovative solution based around sales inputs, the number of calls and meetings put into an Account.  A calculation then assigned a monetary value to this activity and using the newly provided Sage accounts information also calculated the return on this input as a "Sales/Call" figure.  This information gave a good indication of what was working and what wasn't, which allowed Quanta to try and recreate the things which were working.

This did however come with its own challenges as often an Account would simply be a single site of a large multi-sited organisation.  This affected both the sales from an Account as well as the ROI, often giving a very inaccurate picture. Empath-e came up with a solution by the introduction of an "Invoicing Group" for those accounts where this was true, which linked into a Group ROI Tab.  This would look at the sales from a group perspective as well as the effort and produce an accurate ROI sales/call figure.

The ROI was simply one of the measures which empath-e put in place and others included;

- Days since last opportunity
- Days since last spent
- Days since last course attended
- If the last opportunity was won or lost

This information was displayed simply and concisely in an Account Snapshot, using colours to highlight good and bad points and even some simple graphics to add some fun to proceedings, for example a smiley face being happy or sad depending on if the last opportunity was won or lost!

**Who wants a Cherry?**

Even with all of this information at their disposal the Quanta sales team were still deciding on who they were calling more by gut feel and instinct rather than business intelligence.  Yes, the information was now in the system but they were still "distracted" by other aspects or too keen to phone the people they had a good relationship with and not necessary the ones who they should.  This "cherry picking" had to stop to increase the ROI that Quanta could now so easily measure.

Quanta were already building Business Intelligence groups within SLX using the data with empath-e has created, for example;

- People with an In Date Expected Spend
- People who are Head's of Departments

- People who we have sold to with no Expected Spend
- People who we had an Opportunity with but sadly it was lost

Quanta needed though a way to control the people who were in these lists further, based around the recent activity. To achieve this empath-e soon noticed that phone calls were being completed for 2 reasons - successful contact and what could be called un-successful contact (left a message, Joe is on holiday etc). Quanta needed a way to sort these two from each other as a simple filter based around the date of a last completed phone call activity would not work.

This is where empath-e introduced Quanta's Auto-History functionality, a simple one click solution which would ask when clicked, was the contact successful or not? If successful a normal activity was completed and if not a simple one line was inserted, "Phoned – Left Voicemail". From here empath-e created a number of new date based fields for Quanta to use:

- Date Last Called
- Date Last Tried
- Date Last Met

This enabled Quanta to change their suite of Business Intelligence groups to only show people who had not been called or tried within set periods of time and thus "hiding" from view the people who sales loved to call.

This strategy was further enhanced by what Quanta called a "removal of clutter" where empath-e moved a number of fields at Account & Contact level so the fields on the main screen all had to be filled in, whereas before there was a bit of confusion by the sales team as to what should be filled in and what was no longer used etc. The message was now simple, if you can see it fill it in and ensure the data is up to date and if someone is in a contact group - call them!

**Mission Complete?**

Was Quanta's missile guidance system complete? Well who knows, one thing is for sure it is certainly hitting a lot more targets in a strategic and measureable manner than before, giving Quanta a better ROI than before. But as with everything it is essential that things never stand still and never stop evolving, so I am sure Quanta will be back asking empath-e for the next evolutionary step before long! For example Quanta are already looking at ways to integrate email marketing packages and their phone system with SLX for digital marketing and outbound speed dialling.

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### Why do you believe this implementation to be particularly noteworthy?

At every step of the way and every turn empath-e was able to deliver the solution which Quanta needed and often more. Never was anything impossible and the “can do” attitude and ability not to take things at face value and think around problems faced by Quanta, were integral to the success of this implementation.  Quanta now has a world class CRM system, which has been commented on and referred to as such, which they believe has been an essential part of their success.

### Would the customer be prepared to become a Sage CRM Solutions case study?

Yes

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## FAQs

**Who can enter?**
Any Business Partner who sells Sage CRM or Sage SalesLogix either standalone or as part of a suite, such as Sage 1000 or Sage 200.

**How recent does this implementation have to be?**
It must have occurred since November 2009.

**I have several instances that may apply. Can I submit more than one application?**
Yes.

**What is the deadline date for entry?**
Applications must be received by Friday 24th September 2010.

**What is the process for judging?**
All entries will be judged by a Sage panel. You may be asked to provide further information or facilitate a meeting with the customer involved.

**Who forms the Sage panel?**
The panel will consist of Sage senior representatives from around the business.

**How will I know if I have been successful?**
The winner will be given their award at Visions. Please note that because of the size of Visions, not all CRM specific awards will be presented at the formal Awards ceremony...

**What do I get if I win?**
The winner will receive:

- A unique award.
- Use of the award winner logo for 1 year.