

## ITM GROUP delivers superior customer service and develops efficiencies for the future with Sage CRM MME



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Neil Curtis  
Head of Marketing, ITM Group

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## CRM Mid-Market Edition

### Case Study

#### Introduction

Through growth and acquisition ITM Group found itself using a mix of spreadsheets, databases and contact management systems to deal with its customer base. As a result, it was difficult to track all the activities associated with serving their customers.

Neil Curtis, Head of Marketing at ITM Group, was responsible for the implementation of the CRM strategy. He commented; “*Different sales people were using different systems to enter in opportunities, what we needed was one consolidated system where we could carry out all reporting and marketing campaigns, a system that was accurate, efficient, easy to use and offered value at every touch point within the organisation. Sage CRM MME delivered on all these key areas.*”

## The Selection Process

The ITM Group board viewed the deployment of a Customer Relationship Management tool as a key strategic move. Although there were a number of systems in use within the organisation there was nothing that could be described as a cohesive CRM solution.

To properly assess these needs ITM Group carried out a 'needs and skills' review. Sage CRM MME was among a half-dozen competing solutions the ITM Group evaluated during its selection process. Curtis said; *"We needed a system that could provide value to all stakeholders, marketing, sales and ultimately our customers."*

The ITM Group's guiding principles for its new CRM solution were as follows; increase the knowledge of customers and the market through better data accuracy; increase the effectiveness of the sales team; improve the sales team time management; protect existing customers by becoming compliant to imminent data protection legislation; provide better customer information and measure the return of marketing and sales investments. The solution also needed to accommodate the ITM Group's expected future growth.

## Sage CRM MME was selected

Sage CRM MME was selected by ITM as it was easy to use, intuitive and well designed. They found Sage CRM MME to be flexible enough to automate their preferred business processes. Curtis said *"Critically, we didn't want to change our well-established and understood business procedures. The workflow within Sage CRM MME was flexible enough to allow us map the CRM system to our business processes, not the other way around which is the case with many CRM systems, even reputable ones."*

Another key-determining factor in the selection process for ITM was Sage's comprehensive Microsoft Outlook Integration tool. Sage CRM MME has complete two-way synchronisation with Microsoft Outlook's functions. Company-wide initiatives are built on individual users being comfortable and confident in the system they are using. MS Outlook synchronisation helped to break down any lingering resistance to use the system.

## Implementation

Implementation and customisation of the new application went smoothly. It was a well-planned, phased approach. From the planning stage right through to execution took three months. Curtis said *"Accountability and ownership came from the top down during this implementation; we were lucky that we had the right skills in the company to complete this project but as essential was the support of everyone within the company and management."*

Involving all users in the planning was critical to the success. The first phase was the planning and design, detailing exactly what ITM required from a CRM system and then designing each screen layout to a constant specification.

The second phase, the data-cleansing phase, involved the de-duplication, compression and uploading of the data. This enhanced the quality of ITM data before it was entered into the Sage CRM MME system.

The final phase was the implementation and pilot. Curtis said *"A pilot was conducted by two or three of our sales team, both in-house and remotely. Once they were satisfied with the system's performance and the speed of remote access, full roll-out began."* In parallel to the implementation all user guides and training on Sage CRM MME was completed.

## What Sage CRM MME delivers to the ITM Group

ITM has a lengthy sales process, which can last nine to twelve months. Sage provides visibility of the sales pipeline at each stage of the business sales cycle, ensuring that all information is shared across the company. Sage CRM MME manages and measures sales forecasts in real-time, as well as enabling ITM management to add their own assessments to the forecast. Curtis said *"We needed a system that would track all the activities associated with our customers from lead stage right through to close of sale. With Sage CRM MME we can view all interactions that occurred through each stage of the sale."*

Sage CRM MME adds a robust marketing functionality that enables companies to take advantage of valuable customer information. Using Sage CRM MME, ITM plans and designs marketing campaigns with their CRM system. It also tracks response rates which allows them to evaluate the effectiveness of each campaign. All telemarketing campaigns are set up within Sage CRM MME, Curtis said *"Recently we exhibited at the Procurement Solution Exhibition. We developed and managed the complete project within Sage CRM MME, from attaining the number of prospects, tracking leads and enquiries that arose from the exhibition, to evaluating the return on investment and reporting on the overall success of the exhibition."*

The next phase for ITM is to integrate Marval, ITM's Service Management tool, and Sage Line 100, its financial management tool, with Sage CRM MME. Curtis said *"One of the proofs of the success and stability of the system became apparent when our key administrator left to go on maternity leave for 6 months. The system was so well built that it continued to run with minimal issues, and any that did arise were quickly dealt with in combination with the excellent support team at Sage."*

## KEY ACHIEVEMENTS

### A Well-Developed Sales Process.

ITM has control over their sales process ensuring that actions requiring attention or escalation are automatically routed to the appropriate sales person.

### Better Information.

ITM has accurate information and detailed knowledge of their key customers. Information is shared across the business.

### More Targeted Campaigns.

ITM takes advantage of valuable profiling information to deliver better-targeted campaigns.

### Real Time Knowledge.

Sales are provided with real-time rolling forecasts and pipeline analysis.

### Information Retained.

ITM determines what information they want to retain to ensure that future marketing campaigns are more effective.

### Better Data Sharing.

ITM has access to all relevant customer information so that every customer interaction can become a business opportunity.

## About ITM Group

The ITM Group provides integrated information and communication technology solutions and information management solutions to UK and International organisations.

The ITM Group enables its customers to maximise the use of their existing infrastructure and information intellectual property.

ITM Group business and communication solutions are built on the foundation of its long-established industry knowledge and consulting expertise, value-adding software, customer support and comprehensive range of state-of-the-art communication services.

## About Sage

Sage is a global provider of end-to-end business management applications for mid-size businesses. Look to Sage for fully integrated software that delivers high performance, advanced functionality, cross-product integration and unmatched freedom of choice. Integrating powerful front-office Web and wireless capabilities with back-office accounting and operations, Sage provides companies with the solutions they need to enhance competitive advantage and increase profitability. For more information, visit [www.sage.co.uk](http://www.sage.co.uk) or contact us at [crm@sage.com](mailto:crm@sage.com)