



Sage CRM Customer Success Story

Challenge

Lincoln Waste Solutions had outgrown its systems and needed a CRM solution for managing the sales pipeline, improving customer support services and achieving a better overall view of the business.

Solution

Sage CRM provides a single source of data that integrates sales, customer service and marketing, increasing operational efficiencies at the same time as providing real-time insights to better inform future business strategies.

Results

With Sage CRM, Lincoln Waste Solutions has become a more agile business achieving a 40 per cent improvement in customer support. It has put the business on a sound footing for staying lean while maintaining growth.

CUSTOMER:

Lincoln Waste Solutions

INDUSTRY:

Waste Management

LOCATION:

Connecticut, USA

SOLUTION:

Sage CRM

Lincoln Waste Solutions Achieves 40 Percent Customer Service Efficiency Increase With Sage CRM

Headquartered in Bloomfield Connecticut, Lincoln Waste Solutions (LWS) operates a brokerage service, acting as a middleman connecting multi-site businesses in the US and Canada with waste disposal specialists, negotiating deals that benefit both parties while giving itself a revenue stream.

A business model built on transparency – anything it can save businesses is split 50/50 – has helped it differentiate and achieve year-on-year growth of 30 per cent. Success has seen the company move to bigger offices and upgrade its Sage accountancy package to Sage 100 ERP.

The Business Challenge

Jay Lentz, Client Development Executive, recognized that a missing piece in the jigsaw was a CRM (Customer Relationship Management) solution. “We wanted to have reporting and all the communications in one place. When we took on a new client there was no natural transition in our systems from being a prospect to a customer,” he said.

The company had been using Sage ACT! for the sales team and relied on over 500 individual spreadsheets to manage customer relationships. It had worked fine in the early days but was struggling to keep up with the business as it grew.

“There were growing pains that come with success. We had inefficiencies, and a lack of communication as well as difficulties with managing information consistently,” said Lentz. “We needed to streamline processes and simplify communication across the organization.”

An ability to automate reporting and access large volumes of data quickly and simply was going to be important to help the business stay lean while continuing to grow. The company needed seamless integration between accounting, customer service and vendor relations.

Many CRM systems were evaluated before Sage CRM was chosen. Cost, functionality and easy integration with Sage 100 ERP were key selling points, but what really swung it was customization.

“Having the ability to customize the solution was always going to be a big part of the CRM process for us. So Sage CRM was an easy decision in that sense, it had the best customization capabilities,” said Lentz.

The Solution

Implementation was smooth. From signing the contract to running the first cases in Sage CRM took less than two months. A carefully managed training program gave employees the chance to use the software in advance and their feedback was fed into the product.

“Someone suggested a different way of searching the data so a new field was dropped in. We got feedback and we responded to it. It ended up being the smoothest and most successful IT project we’ve undertaken,” said Lentz.

LWS has 20 Sage CRM concurrent licenses that include the remote workers who access the software over the company’s VPN (Virtual Private Network). All the reps on the road have a laptop with access to at least some of the data and there’s a plan to implement a mobile module to make it available on smartphones.

Out of the box, Sage CRM saves lists and tracks interactions as People, Companies, Leads, Opportunities, and Cases. Lentz took the templates and customized them to meet the firm’s specific needs. The complexity of the business means that some customers use primary and secondary waste specialists.

“If there is a customer query, hyperlinks and customized tabs ensure the right supplier is quickly identified. All the data is there in one place and we are able to broker both sides of the business instantly,” said Lentz.

There were deeper levels of customization to help Sage CRM integrate even more smoothly with Sage 100 ERP. Bridging software was developed to better track the movement between sales to accounts and generate more detailed reports.

From the outset, LWS used Sage CRM to run all its marketing campaigns, targeting customers by business segment and sometimes location. “If we have someone going to a particular city we pull up the data and target everyone in that area,” said Lentz.

Results

Sage CRM has delivered a big list of business benefits that Jay Lentz expects to grow bigger as the system develops. Already, LWS is more productive in its day-to-day operations and a more agile business. Having real-time access to accurate data makes it easier to identify emerging trends and react.

“Sage CRM drives efficiency which is the same as profitability for a business like ours,” said Lentz. “Information is king. It gives us a level of reporting and a snapshot of each aspect of the business with a level of detail we didn’t have before.”

Customer support has been transformed. Streamlining access to data has led to a 40 per cent increase in the efficiency of the firm’s support services. Previously, incoming customer queries could only be dealt with by looking through disconnected spreadsheets, documents, and billing software.

“It was definitely inefficient and you might have to look in three or four places to deal with one phone call,” recalled Lentz. “Now it’s all on one screen which makes our people much more productive.”



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Client Development Executive,
Lincoln Waste Solutions



The system is so thorough that any member of the staff can handle a call, open the files and answer a query. Changes can be made concurrently onscreen without resorting to taking notes.

All the sales team's goals are managed through Sage CRM and the pipelines carefully tracked. The company uses the email marketing tools that are already generating business. Outbound emails are automatically saved as a history of client contact that is easily referenced when it comes to making phone calls.

"You don't have to think about saving anything. The history is all there if you want to pull up a name and make a call," said Lentz. "Triggers and reminders are built in to ensure everything is followed up. We can resolve issues in one call, get off the phone and get on to the next knowing that all the history is waiting for you."



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About Sage CRM

Sage CRM is used by over 12,000 organisations in 70 countries worldwide to manage their critical sales, marketing and customer service activities every day.

Sage CRM is optimised specifically for small and medium businesses. Easy to use and quick to deploy in the cloud or on-premise, it delivers a rapid return on investment so you see a positive impact on your business straight away. Plus, it can be easily adapted by you to make it fit how you work, saving you time and money, both now and in the future. In this way, we help you get the most from your CRM investment and accelerate your business growth.

The Sage Difference

- The leading supplier of CRM solutions to SMB organisations worldwide
- Over 6.3 million customers
- Over 3.1 million Sage CRM Solution users worldwide
- Over 13,400 employees
- Over 30,000 Sage-certified partners specialising in business applications
- Direct presence in 24 countries
- Relationships with over 40,000 accountancy practices
- 30 years experience