

Case Study

“ProspectSoft CRM is now the spine of the business, which is used by everyone from the Managing Director downwards.”

Baxa Marketing Director Jonathan Baldero



Baxa Ltd in Ascot, Berkshire, is a subsidiary of Baxa Corporation of Englewood, Colorado USA.

The company supplies pumps, oral liquid dispensers, infusion and IV devices to hospitals and medical facilities in Europe, the Middle East and Africa (EMEA). Sales and support activities are managed from Ascot, with a sales office in Denmark and three other mobile sales and technical staff across the region. Up to the beginning of 2002, Baxa used Maximizer to manage its EMEA contacts.

Key Objectives

By the end of 2001 it was clear that Maximizer could no longer meet Baxa’s needs because of its inflexible structure, lack of accounts integration and restricted mobile capability.

Baxa reviewed various products like Act! and Goldmine but they too, could not meet the specific requirements for users in the office and on the move to manage sales and after-sales activities. The US parent had deployed Pivotal CRM, but this was perceived as overkill for EMEA operations, so in April 2002, the installation of ProspectSoft CRM in Ascot began, for four main reasons:

- ProspectSoft CRM provides real mobile access for remote users to enter orders and check stock off-line
- The system integrates seamlessly with Access Dimensions, enabling office and field-based users to access information in the sales ledger
- ProspectSoft CRM can pass information to and from other database systems, including Pivotal CRM in the US headquarters
- Baxa has been able to customise the system’s user interface and tailor it to meet the company’s specific needs

Results

Since implementation, Baxa has had much more effective management of sales and support activities, from logging and tracking new enquiries, to handling after-sales customer problems. Information flow between UK and Danish offices, to and from the HQ in Colorado, is now smooth and reliable. Following the initial success, an ongoing programme to add more users and increase the systems functionality has continued. Says Jonathan Baldero, Baxa’s Marketing Director: “ProspectSoft CRM is now the spine of the business, which is used by everyone from the Managing Director downwards.”

Key facts

- Industry: Medical equipment suppliers
- No of staff: 25
- Accounting System: Access Dimensions
- Previous CRM system: Maximizer

Priorities for CRM System

- True mobile access to information
- Close integration with Access Dimensions
- Data integration between UK and US operations
- Flexible user interface

CRM System Details

- No of Sites: 2
- No of Network Users: 12
- No of Mobile Users: 10
- No of Modules: 11
- Installation began in February 2002

Key Features

- **Configurable** for many sizes and types of organisation with multiple functional modules
- **Fully scalable** from entry-level to enterprise-wide solution
- Sales force, marketing and field service **automation**, all with management escalation
- **Dynamic integration** with **Microsoft Office** giving full document management
- **B2B and/or B2C customer relationship management** within one system
- **Dynamic analysis and detailed management reporting** on customers and suppliers, sales, service or products

