

Case Study

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Michael Anderson, Director of IT and Logistics, Carl Stuart Ltd.



Carl Stuart Ltd distributes scientific equipment for laboratories and process applications, mainly to high-tech industries.

With offices in Dublin, Newtownabbey in Northern Ireland and Leek in England, the company supplies customers throughout Ireland and the UK. According to Michael Anderson, Director of IT and Logistics, accelerated company growth from the mid to late 90's resulted in a patchwork of IT system, supported by multiple suppliers. Therefore the organisation needed to streamline hardware, systems and suppliers.

Key Objectives

In the Dublin head office, Carl Stuart Ltd used some sales management software that was limited and provided no integrated sales data across the whole organisation. The company considered upgrade possibilities, which, though costly, still offered little in the way of true cross-departmental integration, particularly with accounts. After lengthy research, Michael Anderson attended a ProspectSoft CRM demonstration at Quantum Business Solutions in Dublin and, early in 2003 his company installed a 12-module ProspectSoft CRM system.

The main reasons for choosing the system were:

- ProspectSoft CRM integrates seamlessly with Pegasus Opera and other back-office software. Also, it provides instant information flow between all departments and branches, to both office-based and mobile users
- ProspectSoft CRM's in-depth analysis and reporting tools provide Carl Stuart with detailed business Intelligence about customers and suppliers

Results

As Michael Anderson says: “We now have a central platform on which all data is held so, from suppliers to customers the whole company, including staff on the road, has a total perspective.” He adds; “This allows us to automate, manage and analyse activities from within a single application. Reporting on these activities was previously impossible as they were held in a multitude of media including standard office applications and the dreaded paper trails.”

More recently, Carl Stuart added the Screen Customiser and Problem Analysis Matrix modules, to make even more use of the comprehensive functionality of ProspectSoft CRM.

Key facts

- Industry: Distribution of laboratory equipment
- No of staff: 35
- Accounting System: Pegasus Opera
- No previous CRM system

Priorities for CRM System

- Tight integration with Pegasus Opera
- Instant information flow
- In-depth analysis and reporting functionalities

CRM System Details

- No of Sites: 3
- No of Network Users: 15
- No of Mobile users: 15
- No of Modules: 14
- Installation began in January 2003

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