

Case Study

“ProspectSoft CRM has enabled the company to manage service contracts smoothly, through a period of major expansion.”



Evac+Chair Ltd manufactures emergency stairway evacuation solutions for disabled or injured personnel. Other products facilitate short or long distance transport of the sick or injured.

In 1986 Par-Aid (Aid for Paraplegics) a division of Weston Hydraulics, had 5 people. A buy-out in 1989 created Evac+Chair, which is now a dynamic, 50-strong Birmingham company. Some sales and service staff are home-based. Except for the USA, products are sold worldwide through distributors.

Key Objectives

The service operation was the prime target for a CRM system. Because the products are safety devices that are subject to mandatory inspection and service, it was essential to bring the planning and management of field engineers' activities under close control.

Providing accurate, up-to-date, customer and service details to engineers in their homes or on the road, would improve operating efficiency significantly, by reducing the frequency of office visits.

Other hoped-for benefits were savings in time and a reduction in transcription errors, by avoiding manual re-entry of data into multiple software applications.

Results

In August 2004, Evac+Chair commenced installation of the ProspectSoft Customer Relationship Management Suite, which yielded four early benefits:

- The system tracks all on-site inspection and maintenance schedules and assigns follow-ups to engineers, *without them needing to visit the office.*
- ProspectSoft CRM integrates seamlessly and interacts extensively, with the Pegasus Opera II accounting system
- The system automatically replicates all customer information such as projects and quotations, as well as accounts data, to users at home or on the road
- Detailed analysis & reporting on key performance parameters is available

Through close integration with Opera II, ProspectSoft CRM tracks all products sold, then sets and monitors dates for service engineers to carry out customer training and site-surveys.

Internal communication and logistics management have also been improved, as a result of implementing the system.

According to Barry Scholes, MD of Evac+Chair. *“All people in the company are very confident using ProspectSoft CRM and even those who don't use it, can see the benefits that it has brought to the business”.*

Scholes goes on to say: *“ProspectSoft CRM has enabled Evac+Chair to manage service contracts smoothly, through a period of major expansion.”*

In January 2005, Evac+Chair began to equip field sales staff with mobile CRM and is considering additional modules.

Priorities for CRM System

- Effective scheduling and tracking of service teams' activities
- Close integration with Pegasus Opera II
- Maintaining service contracts and regular health and safety inspections

Key Facts

- Industry: Safety and Medical Products
- No of staff: 50
- Accounting System: Pegasus Opera II
- No previous CRM System

CRM System Details

- No of Sites: 1
- No of Network Users: 3
- No of Mobile Users: 4
- No of Modules: 4
- Installation began: August 2004

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

