

Case Study

“Response times to sales enquiries, user training, support and technical issues have halved, in a period when growth has increased by 20%.”

Liv Hodge, Sales Director, Kapitex Ltd.



Since 1991, Kapitex Healthcare has specialised in airway management devices and solutions for head and neck cancer patients. Committed to product development and, with a record of meeting short delivery times, the company has earned an excellent reputation for quality, innovation and service.

Headquartered in Wetherby, Yorkshire, under a very experienced management team, Kapitex staff focus on product design, marketing and support, while highly specialised sub-contractors are used for manufacture and assembly. Customers in the UK are primarily NHS hospitals, for which 5 regional product specialists provide user demonstrations and on-going training. Overseas business is handled through a network of national distributors.

Key Objectives

As a consequence of rapid growth, Kapitex faced increasing problems of:

- Managing all customer interactions in a complex NHS Trust hospitals structure
- Giving all office and field staff access to those interactions and critical issues
- Tracking enquiries from all sources, including international distributors
- Marketing an expanding product range

- Easy access to customer data in the Sage Line 500 accounting system

Results

After reviewing a number of offerings, Kapitex selected the ProspectSoft CRM solution for several reasons:

- The system’s structure is ideal for NHS Trusts with hospitals on different sites, each with multiple departments and staff with widely varied responsibilities
- ProspectSoft CRM logs and tracks all types of customer interaction; phone calls, e-mails, faxes and letters, about sales opportunities or customer issues
- The system manages different types of sales opportunities, from large projects to simple orders for consumables; from UK customers and overseas distributors
- Integration with Sage Line 500 gives access to products and prices and to the Sales Ledger, to maintain a Sales History file in ProspectSoft
- Office staff and those on the road, using laptops, can access all data, equally

System acceptance in the company was rapid because of smooth data transfer, which gave instant access for all staff to all customer issues. According to Sales Director Live Hodge, *“A significant improvement in customer intelligence throughout the company has resulted in more rapid and detailed information flow. Response times to sales enquiries,*

*user training, support and technical issues have halved in a period when growth has increased by 20%.”*

The company anticipates more benefits from closer integration with Sage Line 500 and, as additional ProspectSoft CRM modules are implemented, to advance technical support.

Priorities for CRM System

- Log and track sales opportunities and after-sales issues, within a complex NHS customer-base
- Manage extended sales projects and simple consumables sales, concurrently
- Integrate with Sage Line 500 accounts
- Easy access to all customer interactions and data, by office and field-based users

Key Facts

- Industry: Medical
- No of Staff: 18
- Accounting System: Sage Line 500
- No previous CRM System

CRM System Details

- No of sites: 1
- No of Network Users: 8
- No of Mobile Users: 7
- No of Modules: 8
- Installation began: October 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