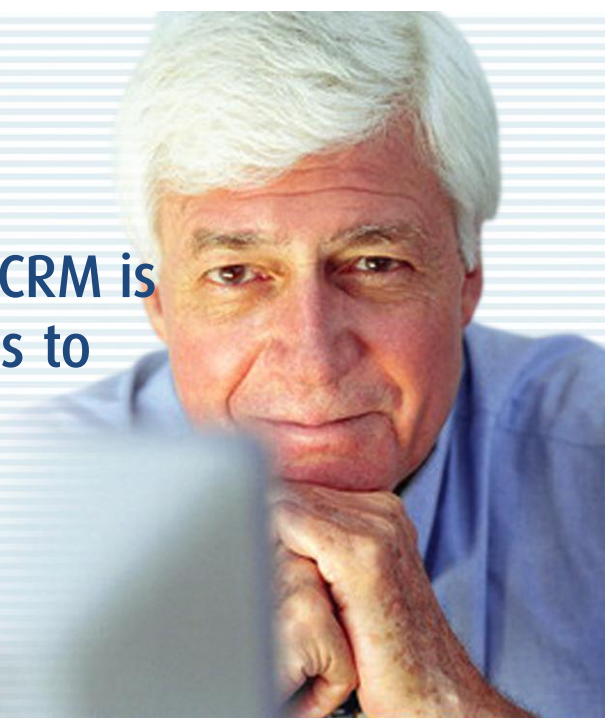


Case Study

“It is evident to us that ProspectSoft CRM is saving us a lot of time when it comes to quoting. It also has streamlined our operation past this point, right up to invoicing”

Martin Cocks, Project Engineer, Metalock Engineering UK Ltd



Metalock Engineering UK Ltd, based in Coventry England is an established global mechanical equipment repair company. (www.metalock.co.uk)

Metalock UK provides a range of specialist engineering services to a diverse range of engineering industries all around the world, which include Power Generation, Marine, Petro Chemical, Steel, Paper, Pressing & Forging, Mining and Offshore.

Key Objectives

- To respond quickly to customer queries.
- To automate the sales process, maximising conversion and sales staff effectiveness.
- To eliminate the time-consuming manual quotation process.

Solution

Access© was initially evaluated, but did not match overall requirements. Bridge Associates, one of the Gold Partners of ProspectSoft, recommended ProspectSoft CRM due to its overall functionalities that would satisfy Metalock's key objectives.

Results

- All ProspectSoft CRM users can now respond quickly to customer queries due to instant access to customer information.
- Customer quotations can now be generated in minutes rather than hours.
- Integration with Microsoft Office ensures elimination of re-keying errors.
- Metalock's complex sales process is now easily and quickly managed.
- ProspectSoft CRM users can access all Opera sales ledger transactions.

A further four mobile users can also access critical customer data at any instance. These functionalities give all mobile users the ability to process and confirm orders. 'Out of Box' accounts integration with Opera effectively links back office processes, providing an end to end solution to enhance business growth.

Key facts

- Industry: Manufacturing (Services)
- No of Staff: 58
- Accounting System: Opera II
- No Previous CRM System

CRM System Details

- No of sites: 1
- No of network users: 20
- No of mobile users: 4
- Installation began: November 2006
- Installation end date: February 2007

More Case Studies available at:

www.prospectsoft.com/crm/users

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

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