

“Managing the sales process has become much easier. Lead status categories help us to identify where the customer is in the lifecycle, and decide what is needed to move them forward.”

Adrian Lowe, Sales Executive, SMC Wholesale



SMC Wholesale, based in Exeter, is a specialist supplier of melamine, veneer and plastic edgebanding. Helpful service, expert knowledge, the best quality, competitive prices, an unequalled product range and quick delivery have been critical to the company's success.

#### Key Objectives

With a new telesales operation to supplement its field sales force and more and more customers to manage, SMC recognised the need for a Customer Relationship Management system that integrated with its Pegasus Opera accounting system. After reviewing various options, a 7 module system was purchased from ProspectSoft Gold reseller Applied Business Solutions, due to its powerful contact, document and opportunity management, marketing analysis and customer service functionality.

#### Results

- Sales data is now transparent across all departments, both on and off site with an easy-to-use interface.

- Sales staff can now develop and manage each customer account effectively and efficiently, with the ability to monitor and track all activities and interactions.
- ProspectSoft allows users to effectively identify customer needs. The information held on each record allows users to gauge market trends and buying patterns.
- SMC can now develop relationships and create strong foundations with customers, allowing sales staff to gain full understanding of a customer's requirements.
- ProspectSoft has allowed SMC to create a support infrastructure, built on standard processes and documents.

ProspectSoft CRM has helped to integrate SMC's front and back office processes, improving operational transparency. Transparency has not only improved internal communications but, more importantly, has improved communications with customers.

Key analysis of customer data has optimised targeted marketing activities, particularly for direct marketing campaigns. Customer buying behaviour and patterns can be analysed to monitor fluctuations in business volumes, allowing SMC to intervene if and when required.

#### Key facts

- Industry: Manufacturing (Services)
- No of Staff: 15
- Accounting System: Opera
- Previous CRM System: Goldmine

#### CRM System Details

- No of sites: 1
- No of network users: 4
- No of mobile users: 2
- Installation:  
Project started 9 July 2007- LAN users live on 19 July – Mobile users live on 1 August

More Case Studies available at:

[www.prospectsoft.com/crm/users](http://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

