

## Sage CRM Case Study



# Renoir Group makes a positive impression with Sage CRM software

### The background

Renoir Group is a management change consultancy that specialises in working with CEOs to translate their vision into improved productivity and profit margins. They work with clients across a variety of sectors, including Tata Steel, National Express, 3M, Harrogate District NHS Trust and Barclays Bank.

Renoir have been trading for over 13 years and now operate worldwide. They have regional offices in ten countries including the UK, the USA, India and Australia and a number of mobile staff.

One of Preact's most valuable clients, Renoir have been working with them since 1999.

### The challenge

Renoir had been using ACT! for several years, to connect their staff across the globe to a centralised customer database.

ACT! does support remote working, but with so many individual users and offices worldwide needing to synchronise their local copies of ACT! with the central database, at times they were exceeding the capability of the system.

One of Renoir's principal consultants, Van Fleisher, contacted Preact in response to their communications about Sage CRM, to see whether this might be a good alternative for them.

Van explains, "Our people normally work in teams of two - a home-based telemarketer and a field-based business developer who works on the fly, often from hotels and client facilities. The telemarketer sets up a meeting for the business developer, who then submits meeting notes to the shared database.

"We were pushing the envelope. 30+ users and over 10,000 records were being synchronised four times a day. Our version of ACT! was also coming to the end of its life as a multi-user, multi-site product".

Preact's MD, Selom Bulla, confirms, "Renoir Group used ACT! to underpin impressive business growth and development. When they approached us and explained the challenges they faced in taking their business to the next level, it was clear that the task was beyond ACT!".

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### Solution Overview:

- Web based CRM solution to support a virtual company with a globally deployed user base.
- Successful conversion from using ACT!
- Increased customer focus and communications tracking.
- Immediate gains in customer service and user productivity achieved.
- Strong support from Preact CRM and Sage.

Van hoped Sage CRM might offer similar ease of use to ACT! while streamlining things for them, as the data would sit in a single SQL database rather than individual copies having to be synchronised with a central system. He also wanted a system that could be linked up with the Hoover's online database that they use for research into potential clients.

The international set-up of Renoir Group added a certain degree of complexity. They don't have their own IT department but employ a small company in India to administer their systems. The CRM database would be managed from there but hosted on servers in North America. The users of the new system would be scattered across Europe, Asia, Australasia, the USA and the Middle East.

### Our solution

The web-based nature of Sage CRM makes it a good fit for a virtual organisation like Renoir.

Preact's lead technical consultant on the project, Ian Mennie, observes, "with a web based solution like Sage CRM you don't have the issue of synchronised copies of the database being held on each user's PC - the perfect solution for an international company with a globally distributed workforce".

ACT! also offers a web-based system, so Van was keen to understand the differences between the two. The Preact technical team explained that Sage CRM is a more advanced product and offers far more development potential than ACT!

Preact provided Van with an online demonstration of Sage CRM. Determined to make the right choice of system for Renoir, he compared this with other options from different providers, including Salesforce.com.

However he was keen to continue working with Preact. "In the roughly six years that we ran ACT!, we found the Preact team very responsive and easy to do business with. With this sort of endeavour that's critical, particularly as we don't have our own IT department."

Van asked to be put in touch with a client currently using Sage CRM. Preact referred him to IFS School of Finance, who they had also helped make the switch from ACT!. IFS explained the benefits they'd gained from Sage CRM and reassured Van about how easy it is to use.

Before making a definite decision, Van also asked for assurance that Sage had a long-term commitment to the CRM product. Preact contacted Sage and they were able to demonstrate their seriousness of intent by providing an outline roadmap for the product's development.

At Van's request Preact then set up a further online demo of Sage CRM, using Renoir's own data so they could evaluate it fully. This was an involved process. Van confirms "One of our people and one of Preact's worked together on it 24/7 to make it work. This reinforced my decision to go with Preact".

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Van subsequently placed an order for a 20-user deployment of Sage CRM, which has since increased to 35.

At a scoping meeting held at Preact the technical team discussed and agreed the structure of the database with Van and his colleague Lisa Quinn. They then submitted a requirements and design report and statement of work for their approval.

Preact then provided Renoir with a provisional customised database layout to test. They also carried out training and the system went live a few weeks later, some 2 months after receiving the order confirmation. The Preact team were able to do everything remotely, so despite the international nature of the client there were no travel expenses incurred.

Preact's project manager, Leanne Mennie, comments, "Renoir's global set-up didn't pose us any serious problems although, because of the time differences, almost round the clock support was needed pre- and post-implementation. With careful planning and monitoring we were able to successfully deal with any issues, so the virtual nature of their business didn't have a negative impact".

### The result

In the weeks following the implementation Preact made several tweaks to the system in response to user requests, and helped the Renoir team quickly build up confidence in using Sage CRM. Since then everything's been running smoothly.

Renoir are completely happy with the implementation and the support they have received from Preact, as Van confirms. "Again, hats off to Preact! They've been extremely supportive and flexible in working with us - just as we have come to expect. As consultants ourselves, we recognise with Preact the key ingredients for a successful consultant/client relationship - trust and ability".

And as a result of the changeover Renoir have improved the way they do business: "We're becoming even more customer focused. Unlike ACT!, Sage CRM is fully relational which allows us to keep records of contact with several people in one organisation. And it makes it easy for us to keep track of our communications with them thanks to its ability to integrate seamlessly with Word and Outlook.

"We don't have any corruption or synchronisation issues as we did with ACT! and as Sage CRM is being constantly upgraded, it just keeps getting better!".

Preact's pre-sales consultant, David Brettell, sums up, "with its globally distributed user base, Renoir provides a shining example of how effective a CRM solution can be in a virtual office environment".

### The future

Van concludes, "Sage seems determined to develop a CRM capability to complement its vaunted accounting software. We've seen many important upgrades - there'll be more to come, and it's already great.

"It's hard to know what's over the horizon, but given our past ten years with Preact and Sage's reputation and intent to become a major player in CRM, I'm pretty confident we'll be happy with our CRM set-up for the foreseeable future".

*" Sage seems determined to develop a CRM capability to complement its vaunted accounting software. We've seen important upgrades in the eight months we've had the system – there'll be more to come, and it's already great. "*

Van Fleisher,  
Principal Consultant  
Renoir Group



### About Preact CRM:

We are independent customer relationship management consultants. By supplying over 10 different CRM applications we help organisations select the best software from a wide field based on their individual needs. With proven methodology we offer complete support for CRM implementation project planning, database design, customisation, installation and user training.

To arrange a free, no obligation meeting call  
0800 381 1000



## ABOUT PREACT CRM

Preact is an independent Customer Relationship Management (CRM) consultancy working with businesses in the private sector as well as charities and educational organisations.

As multiple award winning CRM architects, we've been helping businesses achieve results with CRM since 1993. Our experienced team combine strong consultative skills with professional implementation skills and a commitment to customer service excellence.

By providing 4 distinct CRM systems: ACT!, GoldMine, Sage CRM and Microsoft Dynamics CRM we offer an independent view of the CRM market to help businesses choose the best software for their immediate and long term needs.

## CRM EXPERTISE

At Preact we believe in providing impartial pre-sales advice combined with proven implementation methodology to help businesses achieve rapid and long term benefits from their investment in CRM. We understand the competitive advantage that CRM can leverage through sales, service and marketing process efficiency so our consultants work closely with clients to design and deploy systems precisely in line with individual businesses needs.

We complete over 150 CRM projects each year for customers in numerous industries with varying sized deployments from 1 to 200+ users. Our Microsoft Gold Partner certification and our status as a leading Sage and FrontRange Solutions business partner reflect our ability to deliver complex and innovative solutions.

We have been honoured with many awards including Sage ACT! Business Partner of the Year 2009

Our recent CRM projects have included implementations for John Lewis Plc, The Ethical Tea Partnership, ThomsonLocal.com, Scottish & Southern Energy, Cranfield University, DPAS Dental Plans, Europa Worldwide Logistics and Marie Curie Cancer Care.

## AWARD WINNING CRM SOLUTIONS

- Unrivalled coverage of ACT!, GoldMine, Sage CRM and Microsoft Dynamics CRM
- UK's most experienced ACT! reseller
- Best online pre-sales resources for Microsoft Dynamics CRM, Sage CRM, GoldMine and ACT! content
- Free demonstrations, web presentations and proof of concept consultancies available

