

## Systemcare (UK) Limited Case Study

### Microsoft CRM integrated with Sage and SMS

Systemcare is a fast growing **telecommunications reseller** based in Worthing in Sussex installing and maintaining telephone systems for businesses in the area. The company is riding the changing marketplace for telecommunications technology specialising in implementing the cost savings of VOIP within the market for traditional telephone systems.

Systemcare employs a team of **ten sales people** who make outbound calls to thousands of businesses each month offering modern cost-effective telecommunications systems connected with BT Openreach and through the internet with Gamma Telecom. The team book meetings for **five field sales staff** and sales are progressed from the quotation stage onwards by head office staff.

Systemcare made the decision to implement **Microsoft CRM** in May 2006 after their existing software supplier went out of business. Their requirements included the replacement of the functionality of a complete software package for **telecoms resellers** as well as uploading all their existing records. Systemcare turned to F1 Computing Systems Limited for the software, training, and installation and to Redware Research Limited for technical and integration skills (and our existing telecoms expertise).

The uploading of information from the legacy system was exhausting and required full use of the **data migration manager**. Over 160,000 leads with 100,000 phone call records had to be uploaded together with detailed information on the existing telecommunications equipment for 11,000 prospects. 2,000 service activity records for 850 existing customers were uploaded together with details of all the financial contracts, phone lines, and broadband information, in an iterative process which took ten days of effort.

The **workflow requirements** for the sales booking process required that the sales team be kept focussed on phoning thousands of leads from databases of information uploaded (and de-duplicated) each month. The process was implemented after a delay when it was realised that the use of **opportunities** was causing too much confusion for the sales staff. A **customised diary** to allow for rapid booking of the field sales team was implemented and combined with a **predictive dialling** system for efficient telesales effort. The sales team took to the system quickly with little training effort and the sales cycle was implemented with some success soon after the initial implementation.

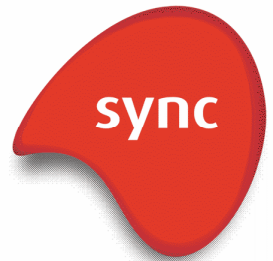
Integration of CRM with the **Sage Line 50** accounting system was accomplished easily with the installation of the **SYNC for CRM** application from redware which provided access to the sales ledger for head office users from within CRM. Links were also provided to a mapping portal and to provide **SMS text messaging** for the head office to liaise between engineers on the road and customers.

The project took **25 days** of implementation effort, excluding installation and training, and was a success with the sales team early on. Head office were slower to adopt the system partly because of the mass of data uploaded from the legacy system and the complexity of changing working practises from a physical job bag containing customer instructions to the use of activities in CRM.

Systemcare are expert providers of telecommunications infrastructure and were able to support CRM themselves by installing the telephony features of the **CyDesk** system that integrates LG telephone equipment with Microsoft CRM and are now looking to help other companies by setting an example of how to leverage the power of combining telecommunications and an effective sales force with Microsoft CRM.

Simon Colley, Technical Services Manager of Systemcare reflects that **'the process of uploading and moving to a new system within a matter of weeks was expensive and painful but the sales team took to CRM very quickly and now, 18 months on, our whole business runs on CRM'**.

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