



## The Customer Value Group optimises sales and marketing investment with Sage CRM MME

### Client Profile

The Customer Value Group (CVG) is an ambitious, rapidly growing company which is entirely focused on supporting client businesses to maximise cashflow and profitability while improving the service they offer to their customers.

CVG's solutions combine innovative invoice control software and experienced consultancy. Client companies, including major blue-chip multinationals, are equipped with the essential tools and the processes to reduce debtor days, drive down sales and administration costs, and enhance customer satisfaction and long-term loyalty. In short, CVG helps clients to generate maximum value from their customer relationships. CVG solutions are used to manage customer relationships worth over €12 billion.

### The challenge

CVG management identified a growing need to make customer relationship management (CRM) a priority. Specific driving factors included an expanding customer base and increased sales and marketing activity. These conditions made it imperative to improve the availability of coordinated information across the CVG team and enhance the professionalism of the sales process.

Previously, account details and marketing information were mainly held in Microsoft Excel and Access based systems, but as Managing Director Dickie Bielenberg notes, "These systems were sufficient in the early days when we just dipped in occasionally, but now we interrogate the data rigorously to build the business. We also wanted greater support for sales forecasting, with improved visibility of the sales pipeline. With higher volumes of new contacts being generated, we recognised that a solid CRM system was essential to control our growth effectively and model the best practice we help our clients to adopt."

### The solution

When CVG explored different options, various CRM product demonstrations failed to impress. "All the solutions seemed over-complicated for our purposes or very inflexible," recalls Dickie. "In contrast, when we invited Sage Business Partner Seelogic to present, Sage CRM MME offered a good fit with the business, with a similar degree of sophistication to our own software. We could see it would be very flexible and easy to use. Seelogic could offer excellent implementation skills, with the customisation required to match our exact requirements."

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**Dickie Bielenberg,**  
**Managing Director,**  
**The Customer Value Group.**

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Once the decision was made, CVG was keen to start using its new solution as quickly as possible. Implementation moved swiftly ahead. Over a three-week period, Seelogic installed a five-user version of Sage CRM MME, running on Dell hardware with Microsoft Windows and a SQL database.

Seelogic assisted CVG fully in scoping the relevant customer data held within various company databases and converting it from Microsoft Excel spreadsheets into the new system. Sales Manager Mary Ellis comments, "Seelogic went the extra mile to ensure that the data migration and the implementation went very smoothly, keeping us fully in the picture through clear communication. As a result, we felt very comfortable about transferring to the new system."

## The benefits

Today, Sage CRM MME is fulfilling the original business objectives and CVG has extensive customer intelligence readily available. All CVG staff are equipped with an up-to-date, transparent view of client accounts and contact information at their fingertips. The source of a lead and its current status can be easily recorded and accessed. Internet access gives the freedom to do this from wherever staff are working.

Dickie Bielenberg comments, "Sage CRM MME has supported us in becoming much sharper and we have realised significant benefits around improved marketing and sales productivity. We target potential clients at the CFO level and do a lot of telephone pre-selling. The solution enables us to capture information and build up a picture of the prospect's business, so that we can prepare a strong case before we meet face to face. We can even establish and record the systems architecture they have in place, so that we go armed with comprehensive knowledge of their infrastructure."

Dickie adds, "We have just begun to use the opportunity management part. We can manage our contacts and the associated workflow more closely so that a lead receives the appropriate follow-up within the right timescales – an immediate sales call for hot prospects and marketing mailings where we need to keep CVG on the radar until a later date. We can also assign a value to the opportunity, giving us a clearer view of where the business is heading. Retrospectively, too, we're building sound intelligence on what works and what doesn't in the sales process, looking at, for example, how pricing and the competitive landscape influence our success rates."

One of the original requirements was for Sage CRM MME to facilitate marketing activities such as building target lists and running mail shots. This has been amply achieved, as Mary Ellis outlines, "We can streamline our marketing activities and focus them where they will bring best return for our marketing budget. The solution keeps a precise record of who has received what marketing material. Target lists are constantly changing and where we are doing a mass email, for example, clever functions such as 'Exclude previous recipients' eliminate any risk of duplication. Associated tasks and actions can be scheduled to make the most of our marketing in a way that was previously very unwieldy. This ensures our lead generation process is managed as effectively as possible."

## The future

With the Sage CRM MME solution firmly in place, CVG is deploying more and more of its functionality over time. CVG is currently considering linking both its in-house customer support 'ticketing' system and its financial system into the Sage solution to create a fully integrated business management solution.

With Seelogic's help, the system is regularly reviewed and fine-tuned to meet business requirements. Having purchased an advanced version of the software, the company is confident that Sage CRM MME will support its growth well into the future, with the ability to handle more users as the number of clients expands and more sales people are recruited.

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## Solution overview:

- An integrated source of client information, accessible throughout the company.
- Support for an extremely professional and effective sales process.
- Maximum value gained from marketing campaigns in generating and following up leads.
- A flexible solution that can be moulded to company processes present and future.
- Rapid implementation by Sage Business Partner.

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## About Sage

Sage is a global provider of end-to-end business management applications for small to mid-size businesses. Look to Sage for fully integrated software that delivers high performance, advanced functionality, cross-product integration and unmatched freedom of choice. Sage provides companies with the solutions they need to enhance competitive advantage and increase profitability. For more information, visit [www.sage.co.uk](http://www.sage.co.uk) or contact us on **0845 111 9988**.