

Dublin Based Industrial Product Supplier Improves Access to Data with SuperOffice CRM

CDSOft Ltd
SuperOffice CRM
Case Study

The Challenge

Instant UpRight needed a CRM solution to help their sales team sell, to help sales managers manage and to improve the overall efficiency within the entire organisation covering customer service, shipping and marketing.

- a) They needed CRM to help coordinate the sales team that is scattered throughout Europe and who travel the world.
- b) They needed SuperOffice Travel to allow sales representatives to take data to clients 'on travel'.
- c) They needed a solution that could provide an 'up to the minute sales pipeline'.
- d) They needed a solution that would integrate with their ERP System 'Epicore Avante' and show real financial data within the CRM system such as invoices.
- e) They needed a solution that would show them at what stage (in real time) of the sales cycle each representative was at with each prospect or customer.
- f) They needed a powerful reporting solution that would show the sales pipeline visually.
- g) Administrators in Customer Service and shipping needed a solution that would handle the large volume of correspondence and paper that moved throughout the organisation daily.
- h) Marketing people needed real time information on customer needs and interests and needed to be able to easily undertake tasks such as mailshots to these customers.

The Benefits Since Installation

"The installation of SuperOffice has worked well throughout the company, even though we are only starting to see the benefits of it now.

The effect of the new system on our remote workers throughout Europe is especially apparent. The account managers are now getting an awful lot more information on their screens, and they find that after logging into the system, they can immediately see the latest activities on their client accounts.

SuperOffice CRM allows for the marketing department to perform direct mail-shots to their customer database, where any email or letter that is distributed is also logged onto their accounts and all follow-ups recorded"

Paul Elson, IT Manager, Instant UpRight



About Instant UpRight

Instant UpRight have been dedicated to providing safe, efficient and innovative access products for both low and high reach work locations for the past 60 years.

A global brand, with customers benefiting worldwide particularly in Europe, the Far East and America, their products are in everyday use for construction, commercial, educational, institutional, and industrial tasks throughout all sectors of industry.

Instant UpRight employ 100 employees in their Dublin branch, which was established in 1966.

The Investment

An 18 user SuperOffice CRM System, with integration to ERP and Sales Pipeline and Dashboard modules, was installed in May 2008.

"For Instant Upright, the major advantage of SuperOffice CRM is that our ERP system has been integrated into the software, which allows for the information from ERP to be transferred over to SuperOffice every night"

**INSTANT
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