

Success story

From multiple bases to a centralized solution - Econotech



The challenge

Econotech's LIMS lacked CRM features, causing inefficiencies in managing customer data. Despite this, it remained crucial to their operations.



The solution

BAASS implemented Sage CRM for Econotech, integrating it with Sage 300 and LIMS to provide a unified platform. This gave Econotech a complete view of their customers and streamlined data across all systems.



The result

BAASS integrated CRM with Sage 300 ERP and LIMS, enabling seamless data flow across all systems. This integration streamlined processes, reduced fulfillment time, and eliminated duplicate data entries, improving customer satisfaction and ROI. The centralized system also enhanced knowledge management, allowing employees to access all key information in one place.



“The system goes a long way to enabling us to build relationships based on historical information.”



Sage Business Partner

Organization

Eastern Currents

Location

HQ - Vancouver, BC

Industry

Distributions Industry

Sage Partner

BAASS Business Solutions



eastern
CURRENTS

Eastern Currents

Eastern Currents Distributing is a primary source of clinical and therapeutic supplies for progressive healthcare professionals. The company's customers are healthcare practitioners practising acupuncture, traditional Chinese medicine, and complimentary healthcare. The company enjoys sustained growth and requires a robust accounting and business management software that can expand as the company grows. They currently rely on Sage 300 ERP, backed by the professional team at BAASS Business Solutions.



The Challenge

Prior to BAASS, Econotech had a Laboratory Information Management System (LIMS), which had good functionality for them in terms of quoting, internal invoice requests, and service lists, but lacked the qualities of a CRM. Furthermore, the LIMS did not help with marketing engagement, due to its inability to record client associated notes, track opportunities, and provide historical data. Consequently, the company wasted a lot of resources on trying to mine information regarding their customers, rather than actually acting on information that they already had. However, due to its status as an integral part of their process, by having the ability to create an order and submit it to a lab, Econotech could not simply exclude LIMS from their activities.

The Solution

After review, BAASS determined that an appropriate solution would be a CRM system. A compelling reason to turn to Sage CRM was due to its integration to Sage 300 ERP. CEO, Rob Robinson, had explained that Econotech's accounting system already revolved around Sage 300. With the implementation of Sage CRM, the system would pull everything onto a single platform. Moreover, Sage CRM's capability would provide Econotech with a 360 view of their customers, whether it be a past or present transaction. Robinson noted that, "you can present yourself more credibly just by your knowledge of who they are. The system goes a long way to enabling us to build relationships based on historical information". This solution makes it easier for the company, as a whole, to have a better grasp and understanding of their customers. It was important for them to be able to move information from their employee's heads to a central database that can be accessed over time.

It was important to maintain the 2 systems that Econotech already had in place. BAASS built integrations between CRM and Sage 300, as well as CRM and LIMS. This ensured that information was able to flow between all their systems. With this integration, as prospects were created, the information could be pushed to Sage 300 ERP and LIMS, which would offer notifications. The connection between CRM and LIMS would allow for a tab in CRM that can display data from quotes and orders that are logged in LIMS. Essentially, all details were able to be viewed in one central data source, as data was pulled from both LIMS and Sage 300, eliminating fulfillment time for customer and contract-specific job tracking and historical testcount and revenue analysis processes, duplicate processes, and customer data updates. Along with the implementation, BAASS had some User and Administrative training sessions for Econotech. Robinson explains his experience with these sessions: "I can speak to the ones that I was a part of, which were the user trainings. I was very happy with the delivery of expertise". He added that the timing of these sessions helped them understand the system, so they could evolve their plan on how they wanted to configure and use it.

The Result

The CRM system offered consistency and greatly reduced time that was previously spent mining data; this time can now be used for customer satisfaction, potentially increasing their ROI. The ability to centralize information advanced Econotech's knowledge management strategy by allowing employees to place their information in one system, and having information right at their fingertips. Robinson described the BAASS process: "BAASS follows a pretty defined, clear waterfall process, and we were happy with that side of things". Using the CRM system daily allowed them to cut research time down from 1 hour to under 5 minutes, clearing up more space for customer engagement. To speak on their experience with BAASS, Robinson noted that, "In the end, some things came up, and it was a challenge for everybody, but no one gave up and no one threw in the towel. At the end of the day, BAASS worked with Econotech, and Econotech worked with BAASS to get a good outcome, which is great". Ultimately, the solution allowed for greater accessibility and transparency to customer related information within Econotech, as well as a centralized location for all of this information to be stored.

