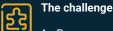# Delivering Stellar Sage CRM Services - Posera Inc. story

The challenge

As Posera grew, it found itself struggling to manage several different software packages across various office locations and departments.

The solution

Posera considered three integrated ERP and CRM solutions before deciding on Sage 300 ERP and Sage CRM. BAASS, a Sage Software Authorized Partner, was hired to implement Sage CRM for Posera.

The result

Sage CRM automates order creation in Sage 300 ERP and provides customer support staff with essential accounting data. Sales personnel can track leads from trade shows, enabling management to evaluate marketing effectiveness and sales performance. Allen Schulman, CFO, notes that this integration has increased efficiency by 10-15% in a year, saving time and money while offering a comprehensive view of customer relationships.

> "We wanted a company with a great deal of experience implementing Sage CRM in complex environments, like ours."

Organization
Posera Inc.
Location
HQ - Montreal, QC
Industry
Provider of Hospitality Technology
Sage Partner
BAASS Business Solutions

BAASS
Business Solutions Inc.

Sage Business Partner

POSERA

Posera Inc.

Posera Inc. is a leading provider of point of sale software and hardware to the hospitality and restaurant industries. Based in Canada, and with offices across the USA, the UK, and France, Posera serves more than 20,000 customers worldwide through a network of more than 150 active distributors. The company's flagship product, Maitre'D Software, is published in several languages. Posera's unswerving commitment to customer service and continual investment in research & development earn the company an exceptionally high 85% customer retention rate.

Integration is the Order of the Day

As Posera grew, it found itself struggling to manage several different software packages across various office locations and departments. Allen Shulman, Chief Financial Officer at Posera, recalls the situation, "We knew we needed to invest in an integrated business technology solution that would serve the entire organization. Of primary importance was a 360 degree view of our customers – not just for our sales team, but for our service, support, and accounting-related interactions as well."

Posera considered three integrated ERP (Enterprise Resource Planning) and CRM (Customer Relationship Management) solutions before deciding on Sage 300 ERP (Formerly Accpac) and Sage CRM. "We performed a SWOT (strengths, weaknesses, opportunities, and threats) analysis involving all three solutions. In the end, we felt the integration in the Sage Software solution was better. It provided the value, the feature set, and the integration capabilities we were after," Shulman says. BAASS, a Sage Software Authorized Partner, was hired to implement Sage CRM for Posera. "We brought in the experts," Shulman adds. "We wanted a company with a great deal of experience implementing Sage CRM in complex environments, like ours."

Company-Wide Information Sharing

As an opportunity is converted to an order in Sage CRM, the order is automatically created in Sage 300 ERP. To help customer support staff deliver better overall service, Sage CRM provides easy access to accounting related data, such as credit terms and recent payments. A salesperson working in Seattle can generate a service request for a customer and the software will notify the appropriate support personnel in Montreal. That same salesperson can then monitor the support case to provide a continuity of service Posera's customers appreciate.

Monitor Marketing Effectiveness

Using Sage CRM, Posera tracks the source of every opportunity in its pipeline. "We can track a specific sale back to the trade show that generated the lead," Shulman explains. "We can uncover how many leads that trade show generated, how many resulted in a sale, and the dollar value associated with the sales. This information helps us make the best use of our marketing dollars."

Management has clear insight of what is in the sales funnel, can evaluate where marketing dollars are spent, the effectiveness of that spending, and monitor how each member of the sales team is performing. "It's opened that window between the accounting and sales side of the business that blends everything together," Shulman says.

Measure the Savings

Shulman says that Sage 300 ERP with Sage CRM Solutions is saving Posera time and money. "People are more efficient, so they are able to get more work done," Shulman adds. "We've only been live for about one year, and we're already seeing a 10-15 percent increase in our efficiency. That efficiency boost comes from the easy, companywide access to data. All our information is in one location which means fewer wasted steps and better, more secure, and reliable data."

A 360- Degree Solution

With assistance from BAASS, Posera found a true end-to-end business management solution that delivers the complete customer-focused view it requires. "We can now see our customer relationship from all angles," concludes Shulman. "We really have a 360 degree view of our customers and our business."