Custom CRM Aligns Business Processes with Customer Service

Business Overview

Edale Ltd. is a leading supplier of advanced, technology-driven printing presses. Edale's flexographic and digital printers play a critical role in the rapidly expanding packaging and shipping markets—enabling customers to maximise throughput, quality, and uptime while reducing material waste. With over 50 distributors worldwide, their reputation for high-quality design and engineering sets them apart in the industry.

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>
> — Ryan Barrett, Edale After-Sales Manager

Challenges

Edale Ltd. manufactures and maintains some of the most sophisticated printing and converting equipment in the world, but the systems running their support operations were inefficient and cumbersome. Most tasks were done manually or through MS Outlook or Excel. If an issue arose regarding equipment already at the customer's site, employees would have to piece together the details from emails, design logs, and sales confirmations and there was no easy way of tracking progress or historical events. For logging and tracking after-sales opportunities, the team at Edale used a pre-existing CRM system, but when they tried to extend the application to other parts of their business, they found it extremely difficult—requiring consultants charging upwards of £1,000 per day.

"When I joined Edale it was clear that things were a bit behind times," Edale After-Sales Manager Ryan Barrett said. "Some time ago we were using a Microsoft CRM system before moving to a more sophisticated solution, but it was never completed or set up to the degree that the business needed." Ryan and his team realised

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Industry

- Manufacturing: Printing Technology

Challenges

- Fragmented processes across after-sales, services, and equipment management
- Previous CRM platform hindered business operations
- CRM platform required cost-prohibitive programming to achieve customised solution

Agiloft and Collins Tech Benefits

- System adaptability enabled deployment of multiple business applications including help desk, opportunity tracking, and asset library
- Agiloft solution provides visibility over key performance indicators within the business and empowers sales with relevant data to improve customer service
- Automated notifications, accurate customer data, and custom workflows provide huge time savings for after-sales team
- No-code environment gives non-technical staff the tools to customise system as needed and complete in-house updates
- Free trial of Agiloft, supported by Collins Tech, allowed for advanced testing before commitment

that to streamline their operations they needed a robust, flexible, and user-friendly system that would eventually extend to all parts of the business. It also needed to complement their unique processes and require as little consulting hours as possible. They hoped that the solution could one day replace their poorly integrated CRM system with something more aligned to overall business objectives.

The Search

When Ryan began looking at the software packages available on the market, he found that most were designed to focus on one element of operations. While they might capture the services tracking aspect of the business, there was no way to tie support cases to an asset library nor expand beyond that into a dynamic CRM. Then Ryan found Agiloft and Collins Technology Consulting—an Agiloft platinum partner.

"Out-of-the-box Agiloft was very close to what we were looking for and the development was very easy," Ryan said. "We didn't want to be chained to a support person charging a significant amount per hour just to do simple things that we should be able to do ourselves. During the demo phase, Collins Tech did a very good job of demonstrating Agiloft's capabilities and they were very helpful at guiding us in how to do it ourselves. They never pressured us to do the development through them, but they were always there to answer tough questions related to integration. They were fantastic at helping us through a lot of semi-development in the beginning so that we could test the Agiloft system thoroughly before pulling the trigger."

When Edale did decide to officially deploy Agiloft, they had their demo system fully operational and in use in less than 48 hours.

The Project

Supported by Collins Tech, Edale initially deployed an Agiloft service desk solution. This platform allowed Ryan and his team to create cases, respond to them, and offer customers a more professional experience when support is required. The service desk solution quickly morphed into a thorough and comprehensive

system that Edale employees use as a directory of all the machines they have built or shipped. This asset register includes machine pages with specific details of each equipment's ship date, critical milestones, serial numbers of parts/modules, previous owners (if applicable), and much more. Support cases are logged against the specific asset so that all critical business information is easily viewed and tracked. Sales team members can also view the asset register and see what a particular customer has in place and the status of any service requests before walking into a meeting with that customer.

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>
> – Ben Collins
> Collins Technology Consulting Owner

Given the ease with which Edale was able to customise the service desk and asset register, they decided to expand their Agiloft system to other internal processes including purchase orders and returns management. Previously, Edale was creating opportunities in their cumbersome CRM but now the plan is to move those over to Agiloft to have one streamlined solution for the entire business.

"I don't have a background in the IT profession, but I was keen to develop the system in order to keep costs low and to ensure that the solution did exactly what we wanted it to," Ryan said. "Collins Tech was instrumental. They were very forthcoming and willing to advise and assist us in our aim of self-management. They were always very quick to respond with an email or a phone call and give us the guidance to modify the system ourselves. Their intimate product knowledge and expertise were crucial."

Solution Benefits

"We built Edale's system with a free trial and moved it over to production when it was complete," Collins Technology Consulting owner Ben Collins said. "We gave Edale an Agiloft platform they could test to prove the system's value before committing to licences. This approach worked well for them as well as for other Collins Tech clients."

With the Agiloft solution and the support of Collins Tech, Edale now presents a more professional image to its customers and has visibility over key performance indicators within the business. Ryan and his team have easy access to regular reports, graphs, and new dashboards. They have also setup their own reminders that complement the company's culture and work style. After-sales team members receive alerts a week before customer opportunities are set to expire and automatic workflows are in place based on the response to these reminders.

"We're seeing significantly less doubling up and less time on researching issues," Ryan said. "Time savings and the accuracy of data are the biggest benefits. The system is very reliable and dynamic— it meets most needs out of the box and can be quickly modified to do even more. It was simple and effective from day one."

Let Us Show You

What Collins Technology Consulting has done for Edale Ltd, it can do for you. Let us show you how. In a few hours, we can set up a custom proof of concept featuring your toughest business process. Give us a call to schedule a time.

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About Collins Technology Consulting

With more than 30 years of experience in developing, implementing, and auditing technology, Collins Technology Consulting brings proven expertise to business software solutions and project management. Offering personalised services and a broad range of support for medium to large companies, Collins Technology Consulting became a platinum partner with Agiloft in 2015. For more information, visit colltech.uk.

About Agiloft, Inc.

As the global leader in contract and commerce lifecycle management (CCLM) software, Agiloft is trusted to provide significant savings in purchasing, enable more efficient legal operations, and accelerate sales cycles, all while drastically lowering compliance risk. Founded in 1991, Agiloft's adaptable no-code platform ensures rapid deployment and a fully extensible system. Using contracts as the core system of commercial record, Agiloft's CCLM software leverages AI to improve contract management for legal departments, procurement, and sales operations. Visit www.agiloft.com for more.