

EndureGo closes the deal with Sage CRM



Customer
EndureGo

Industry
Finance

Location
Australia

Solution
Sage CRM

Established in South Australia in 2006, EndureGo is a professional CPA firm and registered tax agent that provides individuals and businesses with a range of mortgage broking, taxation, accounting and financial planning services. Its full-service approach supports the spectrum of client needs, from simple lodgement of tax returns through to achievement of financial objectives with the help of financial planning, personal insurance and investment properties.

Part of EndureGo's appeal is the commitment of its staff to delivering professional, personalized service and their belief in the importance of fostering long term relationships with clients. Since the company's earliest days, management has sought to enhance customer service by equipping staff with fast access to important client information through a dedicated client database.

Challenge

Until recently this information was maintained in an in-house developed Microsoft Access database. Finance Manager, Cindy He, says, "We were tracking clients and the business was growing, but we didn't feel the database did enough. All we could do was list client details. It was very limited."

What He wanted was a more functional system that would allow consultants to monitor prospects as they progressed from first contact with EndureGo through to becoming a fully-fledged client. "We always get calls from people about our services. We need to put this information into the system and ask things like when is the best time to call them back. We find if we follow up at the right time with one or two calls, the client comes in and then we can close the deal," she explains.

Challenge

Information was maintained in an in-house developed Microsoft Access database which provided limited customer information and did not meet their business needs. They required a more functional system that would allow consultants to monitor prospects as they progressed from first contact with EndureGo **through to becoming a fully-fledged client**.

Solution

EndureGo chose Sage CRM which allowed them to efficiently manage critical sales, marketing and customer service data. Their consultants now use the solution to record every interaction with a prospect or client.

Results

As data is stored in the cloud, consultants no longer have to be in the office when answering a client call or when they want to look up prospect data.

‘Sage CRM allows us to become more proactive with clients. We didn’t have such a good tracking system before but now we have software that allows us to build the business and close the sale’

Cindy He
Finance Manager,
EndureGo

Given the cyclical nature of client financial requirements, He was also keen to find a system that would support existing customer relationships with functionalities such as calendar reminders for key dates and the ability to attach documents or correspondence to a client record.

Sticking with a trusted vendor

While contemplating how to achieve all this, He came across information about Sage CRM, an on-premise or cloud-based customer relationship management system that enables companies to efficiently manage critical sales, marketing and customer service data.

“We had already been using Sage HandiTax and HandiLedger for around three years. The software allows us to work very closely with clients on their financial dealings. Through information from Sage, I found out about Sage CRM,” she notes.

The solution contained all the functionality that He had been looking for. Because it was developed by the same company responsible for EndureGo’s tax and ledger software, the CRM would be able to share information with these other key business solutions. What’s more, the cloud-based offering was reasonably priced and would be fast to get up and running. All in all, it was a low risk decision and He soon decided to go ahead with deployment.

For help designing the system, she turned to local IT services company and Sage business partner, C.P. Moore Business Systems Solutions.

“We had a meeting so that they could understand the structure and then they worked on a design. When it was done they asked us to use it for one or two weeks and provide feedback so that they could make any amendments. They were very helpful. The people there are very friendly, professional and responsible. We’re still using them and will continue to do so for future changes.”

Anywhere, anytime

In early 2012 EndureGo went live with Sage CRM. Information from the old database was loaded into Sage, and consultants began using the system to record every interaction with a prospect or client.

“We’ve found that Sage is more functional and more accurate than our old database,” He says. “With a system like Microsoft Access, as the amount of data becomes bigger and bigger, sometimes you lose data. With Sage CRM, all the information is stored online and we don’t lose any of it.”

Because the data is stored in the cloud, consultants no longer have to be in the office when answering a client call or to look up prospect data. They can log in at any time using their laptop or mobile phone. “Even if I go overseas, I can still see the information,” He points out.

Timely reminders

Reminders are used extensively to prompt follow-up activity with prospects. “If the initiating consultant is not available when a reminder falls due, a colleague soon picks up the case by checking the customer record and familiarising themselves with contact notes and attachments.

As a prospect is converted to a customer, reminders are set for future opportunities such as a services review.

These reminders also provide essential documentation that supports compliance. Whenever EndureGo plays the role of mortgage broker and a deal is lodged with a bank, the company is legally required to follow up and monitor progress with the client every two or so days. Along the way, if the client fails to meet agreed commitments, financial penalties can be incurred. Sage CRM is being used by EndureGo consultants to record the time, date and details of every contact, diffusing the potential for conflict should penalties need to be imposed. He says, “It proves we are discharging our responsibilities.”

“Sage CRM allows us to become more proactive with clients. We didn’t have such a good tracking system before but now we have software that allows us to build the business and close the sale,” He concludes

About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Accelerate your business success with a free 30-day trial at www.sagecrm.com

