

# IDM implement Sage CRM for improved customer service



## Customer

Intelligent Debt Management

## Industry

Debt Management

## Location

South Africa

## Solution

Sage CRM

Intelligent Debt Management, (IDM), South Africa's leading and largest debt management company, has successfully implemented Sage CRM. "The software has enabled us to improve our value, impact and service levels to our clients by catering for a scalable, efficient, reliable and automated customer management system, integrating with all business processes, end to end," says Gary Light, Operations Director at IDM.

IDM offers comprehensive advice and a host of highly effective solutions to South African consumers who are facing financial difficulties and struggling with debt. The company operates from a centralised office in Cape Town, from which more than 170 employees service clients nationally through four separate divisions: DebtBusters, BondBusters, InsuranceBusters and Consumer Debt Help.

"Our business has experienced challenges with customer management processes, which were being handled manually and we were thus in need of a comprehensive and automated client management system. The requirement was one which could handle large volumes of customer data and cater for electronic document management and the archiving of data for compliance purposes," says Light. "Sage CRM enables us to effectively manage process flows and to track the customer's application throughout. The customisation capabilities of the system allows us to adapt it to our specific business needs and the software's ability to integrate with other systems enables us again to scale down on manual work and prevent the duplication of information on other systems. This increases our process efficiency and turnaround time and reduces the risk of human error," says Light.

'The software has enabled us to improve our value, impact and service levels to our clients'

Gary Light,  
Operations Director

## Challenge

IDM had experienced challenges with its customer management process. They recognized the need for a comprehensive and automated client management system that could handle large volumes of customer data.

## Solution

Sage CRM has allowed IDM to effectively manage process workflows and the customization capabilities allows them to adapt the system to its specific business needs. The ability to integrate with other systems enables IDM to scale down on manual work and prevent the duplication of information on other systems.

## Results

Sage CRM has increased IDM's process efficiency and turnaround time, whilst significantly reducing the risk of human error. They now have scalable business process that are reliable and accurate whilst equipping their sales and marketing teams with a centralized tool to manage the relationships with customers.

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According to Light, IDM now has a scalable business process which is reliable and accurate. “Further to this, Sage CRM provides us with a centralised data point, addressing our compliance needs.”

Astraia Technology was IDM’s implementation partner. “It was important for us to select a partner with a good reputation, someone that could grow with the company and that has the skills and capacity to provide a cost effective solution, catering for future enhancements and satisfying our business needs as we expand,” says Light.

According to Leon Mouton from Astraia Technology the implementation process was done in great detail and involved numerous scoping sessions to ensure all aspects had been covered. “To minimise disruption of the workflow in the business, have taken a phased approach. Full training was provided before the roll out, and was assisted by on-site support during the roll out.”

“Regardless of how, when or where customers, partners and prospects choose to interact with your business, Sage CRM provides a decisive advantage by delivering a comprehensive, easy-to-use system. The software equips sales, marketing and customer service teams with the tools they need to effectively manage the relationship with a customer. Sage CRM’s interactive dashboard is an intuitive and customisable workspace from where users can manage their customer activities and daily tasks, for the ultimate user-driven CRM experience. Sage CRM is quick and easy to deploy and can be customised to meet your business needs. Integrated with Sage’s leading ERP systems you can pull together all the data you need for successful customer management, giving you a 360 degree view of all your customers,” says Jeremy Waterman, MD of Sage ERP Africa and the Middle East.

Light concludes, “Without Sage CRM, our business would not have been able to expand to the size we currently are and we would not have been able to fulfill our compliance requirements in terms of the National Credit Act. In our business, we need to ensure that our clients are closely managed and serviced to ensure that their ultimate goal of becoming debt free is realised.”

## 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](http://www.sagecrm.com)

