Sage 300 ERP Becomes the Right Ticket for Telaid

Telaid Industries is a telecommunications integrator that offers multilocation enterprise companies technical products and services. Products range from structured cabling, AV communications, and phone systems to Hoot 'N' Holler/Squawk networks, speech privacy, wireless systems, and call accounting. Services include AV design and build, network staging, and deployment, as well as on-site technical staffing. Founded in 1981, Telaid focuses on large multilocation rollouts and 24/7 service and support to more than 35,000 customer locations nationwide. After several years of using Sage 300 ERP* as an accounting system, Telaid felt it needed to increase the efficiencies of its business processes through integrating Sage CRM.

Efficiently Streamlined Nationwide Tech Dispatching

Prior to implementing Sage CRM, when something would go wrong with a customer's store cash register, POS terminal, or TV in the electronics department, the customer would call Telaid. Because the Telaid Service Groups were using disparate pieces of software, if one group was working with a customer, the others might not know it. Duplicate dispatches were going out for technicians who could have solved two or three trouble tickets on the same call instead of going back each time, costing Telaid time and money.

"We formed an implementation team of key employees who were going to be affected most in using these tools," says Scott Hurley, Telaid general manager. "They helped to refine and change the old work processes so that the tools would fit the new work processes. We compared software, vendors, and eventually agreed on Sage CRM. The ability to integrate was an important factor."

Telaid needed a customized version of Sage CRM, which meant also customizing the integration with Sage 300 ERP. Sage CRM provided customization tools and an open architecture that greatly reduced development and maintenance costs and allowed seamless integration. The business partners consolidated the entire system, creating a customized locator that searches subcontractors across the country. It identifies the right Zip code, skill set, and work rate to service an account. Sage CRM can also assign the job and create work/purchase orders needed to coordinate the entire job, which go from Sage CRM out to the field, back to Sage CRM, and to Sage 300 ERP.

*Sage 300 ERP was named Sage ERP Accpac when Telaid Industries, Inc. initially implemented this solution. The product names have been updated in this case study to reflect current naming.

Customer
Telaid Industries, Inc.

Industry
Video and communications

Location
Niantic, Connecticut

Number of Locations
22

System
Sage 300 ERP
- Accounts Payable
- Accounts Receivable
- General Ledger
- Inventory Control
- Order Entry
- Purchase Order

Sage CRM

Challenge

Prevent time and revenue loss due to duplicate dispatching of 24/7 technician service and support for more than 35,000 customer locations nationwide.

Solution

Customized integration of Sage CRM with Sage 300 ERP to keep service groups informed about who is servicing which customer at any given moment.

Results

Dispatch duplications eliminated with more overall efficient handling of trouble tickets.

As the rollout continues, there are 50 users with plans to expand to 90. Alex Ivins, Telaid service desk manager, says "Sage CRM is a big improvement for working a case through the process to the end. We have customer service groups here in Niantic, Connecticut; Denver, Colorado; and Madison, Wisconsin. They can collaborate on any particular case with continuity, especially during after-hours support. And employees working from home can access this data through the web, putting us all on the same page."

Web Self-Service Eliminates Having to Telephone Telaid

"Another one of our objectives was to have a CRM web self-service portal for our customers to enter service requests, without having to call us on the phone," remarks Ryan Todd, IT manager. "This allows our customers to process their own cases and check status. Sage CRM has absolutely helped us to do this. It automatically opens a case in our system, and the analyst here can work the case accordingly, dispatch a technician, and then update the case. The customer can print their own report based on their preferences, requests, and history through the customized fields they want to see. With 1,100 cases in our first six months, it's one of our biggest benefits from Sage CRM."

One of the Most Telling Qualifications in Telaid Winning Contracts

The process of winning contracts is changing from forming a relationship with one decision-making manager at the IT or facilities telecommunications level to a very involved qualification process administered by bottom line-oriented procurement and legal professionals. Unlike the one decision-making manager, the procurement and legal professionals are under increasing corporate pressure to decrease the expenditures of goods and services from vendors and suppliers. IT services normally supplied by several different vendors under separately

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negotiated contracts are being replaced by a trend toward bundling everything with one vendor under one Master Purchase Agreement. "Qualifying as a vendor involves a vigorous due-diligence process. We are required to supply very detailed information about our company infrastructure, processes, and capabilities for accommodating specific customer cost-saving needs. We're seeing an increase in RFI questions about our having the capability of allowing the customer to integrate invoicing or billing to our accounting system, as well as electronic fund transfer. Without Sage 300 ERP, we could not compete," acknowledges Hurley.

About Sage

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. At Sage, we live and breathe business every day. We are passionate about helping our customers achieve their ambitions. Our range of business software and services is continually evolving as we innovate to answer our customers' needs. Our solutions support accounting, operations, customer relationship management, human resources, time tracking, merchant services, and the specialized needs of the construction, distribution, manufacturing, nonprofit, and real estate industries. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 12,300 people and supports more than 6 million customers worldwide. For more information, please visit the website at www.SageNorthAmerica.com or call 866-996-7243. Follow Sage North America on Facebook at: http://www.facebook.com/SageNorthAmerica and Twitter at: http://twitter.com/#!/sagenamerica.

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