



FILEDER FILTER SYSTEMS

CASE STUDY FOR INAPORT

Fileder Filter Systems has used Inaport, from InaPlex, to revolutionise the way Sage Accounting system (MMS) details are used by its Sage CRM Solution (SalesLogix).

In addition to transferring MMS data to SalesLogix, Inaport performs analysis so that this information can be of the utmost use to both the sales and marketing teams. The Inaport solution cost a small fraction of the initial investment, yet has been crucial for getting the best out of the Sage systems. The result is an exceptional improvement in the effectiveness and quality of sales and marketing, and a vastly more personalised service to customers.

“Sage MMS and Sage SalesLogix have provided us with an excellent environment for managing our entire business, and Inaport has ensured that we can intelligently manage the data that is exchanged between them. For relatively little time and money, Inaport has provided us with a means of realising the full value and benefit of our Sage system investment”.

Martin Ede, Managing Director,
Fileder Filter Systems.

For more information regarding
Inaport, please visit
www.inaplex.com.

Introduction:

Fileder Filter Systems is one of the UK's leading suppliers of filters. Providing a wide range of products, Fileder has a solution for almost any filtration requirement, and fully backs the sales and implementation cycle with a highly qualified, extensive support network. Its range of solutions and comprehensive support allow Fileder to achieve its goal of being an “easy to deal with” filter provider.

Central to Fileder's “easy to deal with” mantra is excellent customer service, and Fileder has invested in the best systems available to ensure this. Fileder has been using Sage Accounting (MMS) for several years to handle the complexity of its solution portfolio. In addition, it recently introduced Sage SalesLogix to handle CRM requirements and ensure the quality of customer service.

Background:

SalesLogix was first installed at Fileder in 2005. It initially operated in isolation of other Fileder systems however this had its limitations. As with most companies, Fileder did not capture all customer data in one place – purchase and billing information, for instance, was captured in MMS – yet it wanted to view all customer details from one location, SalesLogix.

Fileder recognised the need to transfer information from MMS to SalesLogix from the outset, so a Sage AIS link was formed between the two systems to provide:

- A complete view of the client from one point (SalesLogix)
- Comprehensive and up-to-date information on all clients which is readily available to field representatives
- A better understanding of client buying patterns to allow:
 - A more personalised service
 - A proactive sales approach
 - Effective use of a large, historical database
 - Less reliance on third party (purchased) marketing leads

Both systems were working together for nearly a year, however Martin Ede, Fileder's Managing Director, found that simply transferring MMS information to SalesLogix was not providing the revolution in customer management that he knew was possible; Martin wanted to make much better use of all data that was captured.



The Introduction of Inaport:

Jason Rainbird, Filerder's Customer Relationship Manager, had driven the MMS and SalesLogix implementations, and was very familiar with Inaport. Jason realised that Inaport could be the missing part of the implementation jigsaw for Filerder.

Inaport, from InaPlex, is the leading data integration and management tool for the entire Sage CRM Solutions family. Jason appreciated that Inaport could do much more than simply move data from one location to another. He knew that Inaport would also be able to analyse the data as it was extracted from MMS, and then deliver a series of results to SalesLogix that could be used to trigger client management actions.

Using Inaport, client sales history was extracted from MMS and then analysed to determine the status of business with each client. Had the client historically bought a lot, yet recently had slow/no sales? Was the client a strong, consistent buyer? Did the client have seasonal buying patterns? Had the client stopped buying entirely? Answers to questions such as these allowed client status to be determined, and flags set accordingly within SalesLogix.

Scope of the Inaport Solution:

Inaport works as a series of profiles that are developed to perform one, or a series, of functions. Jason decided to keep the solution straightforward, and easy to maintain, by implementing one profile for each type of analysis that was required. The result is a small number of profiles, each made up of only a few, well considered lines, and each one easy to test, modify and introduce.

Profiles have been setup to run automatically each day, in sequence. Information is picked up from the MMS database and then subjected to a series of checks and calculations. From this, the client status can be determined – for instance, active, inactive, dormant, or on hold –and the status is used to set appropriate action flags for each client in SalesLogix. Inaport is also used to place the relevant supporting data in specified locations for each client record.

Field representatives use this information to produce a daily client call profile that highlights priorities and guides sales activities. In addition, when clients are contacted, all relevant information is on hand in SalesLogix to assist with the call.

The update process is run each evening and has no impact on the live MMS and SalesLogix systems. It takes around two minutes to complete for 11,000 contacts and 2,500 accounts, and has "rock solid" reliability. It has not fallen over once since implementation, and has never resulted in a system reboot.

Conclusion:

With Inaport, Filerder has found the data management tool it needs to reap full benefit from its MMS and SalesLogix investments. Considerable benefit has already been gained from the use of Inaport: the sales and marketing process is more efficient, better organised, and more fully supported by client information. In addition, a new telemarketing sales group has been setup to leverage off opportunities arising from a greater understanding of the client base.

In terms of tangible results, the success is reflected in sales figures and more productive output. Filerder has also been able to cut out costly third party marketing leads by making use of the huge database it has acquired over the last 25 years. More important, this database is proving to be a far superior source of prospects to purchased leads.

The next challenge is to understand complex buying patterns and their relation to the product mix, and Inaport will again be used to analyse the information relevant for this. Filerder is confident that the quality of customer information provided by MMS, SalesLogix and Inaport will not only ensure the company remains "easy to deal with", but will also provide considerable ongoing business opportunities and success.

