

**Turnaround Services Global  
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## **CUSTOMER H2CoCo, NSW**

### **SOLUTION Sage CRM**

H2CoCo is the brainchild of David Freeman and boasts a unique range of natural, healthy coconut water-based drinks and virgin coconut cooking oil.

The all natural gluten free, fat free, cholesterol free, dairy free and preservative free drinks are thirst quenching, taste good and offer nutritional value. The instant popularity of these products over recent years placed a lot of pressure on the team at H2CoCo which relied on Microsoft Excel spreadsheets to track sales and accounts and Outlook Express for storing client details and reminders to contact their customers. The company admits that this method was very time consuming and it led to triple handling of sales data. Between one and two hours each day were given over to processing orders. At the same time, the disjointed system didn't offer any means of measuring sales performance or keeping in touch with customers and it was difficult to prepare reports for management.

As the pressure increased the company embarked on a search for a solution. They spoke to a number of CRM software developers and felt that Sage - represented by Turnaround Services Global - was the only one which understood what they wanted and provided an easily understandable solution. Sales Manager Zach Xxxxx says this was extremely important,

"Sukesh got up to speed very quickly and he understood us really well. From the first meeting we felt happy with him. We could tell he knew what he was talking about. He said he could deliver the right solution and he did. He was a delight to work with. Everything was always do-able. He never said no or it's too hard."

"We said that we wanted a system which processed orders quickly, sent the orders to our distributors while they are out on the road, provided reports and reminders to follow up customers. We wanted the orders in Excel then emailed out. A lot of other applications couldn't do that but with Sage we had CRM talking to ERP, usually two separate tools but in this case they were all in the one. If someone had come along and said 'Here it is, work with that' it wouldn't have suited us. We needed a solution moulded to our needs and Sukesh tweaked Sage CRM to our liking", adds Zach.

Zach says the sales department is fully reliant on Sage CRM. The statistics person uses the sales data for forecasting and his statistical reports. He is able to directly access Sage - and not have to wait for the sales department to release its updates - to see how the company is

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tracking. Sage has made it a lot easier for the despatching department which has led to happier distributors and happier customers.

"These days we are 10 times busier than when we started. We wouldn't have been able to generate this volume if we didn't have Sage CRM. Sage has been a massive time saver for us, now it only takes 90 seconds to process a full order. Everything is automated. We almost dreaded getting more customers because it used to add to our work load but now we are growing really well."

Sage CRM has been named "Champion" by the Info-Tech Research Group in their CRM Vendor Landscape Valuation and is the winner of their Best Overall Value Award.

Sage CRM provides:

- single connected platform for sales, accounts, marketing departments
- track sales opportunities from lead generation to close
- plan, execute and evaluate the success of marketing campaigns
- maximise customer communication including targeted email marketing, social media
- Mobile CRM for personnel to access customer information on the go