

POSERA INC.

DELIVERING STELLAR SAGE CRM SERVICES

“WE WANTED A COMPANY WITH A GREAT DEAL OF EXPERIENCE IMPLEMENTING SAGE CRM IN COMPLEX ENVIRONMENTS LIKE OURS”



Posera, Inc. is a leading provider of point of sale software and hardware to the hospitality and restaurant industries. Based in Canada, and with offices across the USA, the UK, and France, Posera serves more than 20,000 customers worldwide through a network of more than 150 active distributors. The company's flagship product, Maitre'D Software, is published in several languages. Posera's unwavering commitment to customer service and continual investment in research and development earn the company an exceptionally high 85 percent customer retention rate. To sustain and build on its success, Posera relies on Sage CRM and the capable consultants of BAASS Business Solutions.

Integration is the Order of the Day

As Posera grew, it found itself struggling to manage several different software packages across various office locations and departments. Allen Shulman, chief financial officer at Posera, recalls the situation, "We knew we needed to invest in an integrated business technology solution that would serve the entire organization. Of primary importance was a 360 degree view of our customers — not just for our sales team, but for our service, support, and accounting-related interactions as well."

Posera considered three integrated ERP (Enterprise Resource Planning) and CRM (Customer Relationship Man-

agement) solutions before deciding on Sage Accpac ERP and Sage CRM. "We performed a SWOT (strengths, weaknesses, opportunities, and threats) analysis involving all three solutions. In the end, we felt the integration in the Sage Software solution was better. It provided the value, the feature set, and the integration capabilities we were after," Shulman says. BAASS, a Sage Software Authorized Partner, was hired to implement Sage CRM for Posera. "We brought in the experts," Shulman adds. "We wanted a company with a great deal of experience implementing Sage CRM in complex environments, like ours."

Strategic Planning Pays Off

The Sage 300 ERP with Sage CRM solution has proven to be the ideal solution for Posera — flexible enough to handle the company's unique business processes, with broad functionality to address all of its requirements. The flexibility inherent in the software enabled BAASS to configure Sage CRM to match Posera's specific workflows, including integration with the company's accounting software.

Company-Wide Information Sharing

As an opportunity is converted to an order in Sage CRM, the order is automatically created in Sage 300 ERP. To help customer support staff deliver better overall service, Sage CRM provides easy access to accounting related data such

as credit terms and recent payments. A salesperson working in Seattle can generate a service request for a customer and the software will notify the appropriate support personnel in Montreal. That same salesperson can then monitor the support case to provide a continuity of service Posera's customers appreciate.

Monitor Marketing Effectiveness

Using Sage CRM, Posera tracks the source of every opportunity in its pipeline. "We can track a specific sale back to the trade show that generated the lead," Shulman explains. "We can uncover how many leads that trade show generated, how many resulted in a sale, and the dollar value associated with the sales. This information helps us make the best use of our marketing dollars."

Management has clear insight of what is in the sales funnel, can evaluate where marketing dollars are being spent, the effectiveness of that spending, and monitor how each member of the sales team is performing. "It's opened that window between the accounting and sales side of the business that blends everything together," Shulman says.

Measure the Savings

Shulman says that Sage 300 ERP with Sage CRM Solutions is saving Posera time and money. "People are more efficient, so they are able to get more work done," Shulman adds.

“We’ve only been live for about one year, and we’re already seeing a 10-15 percent increase in our efficiency. That efficiency boost comes from the easy, company-wide access to data. All our information is in one location which means fewer wasted steps and better, more secure, and reliable data.”

A 360- Degree Solution

With assistance from BAASS, Posera found a true end-to-end business management solution that delivers the complete customer-focused view it requires. “We can now see our customer relationships from all angles,” concludes Shulman. “We really have a 360 degree view of our customers and our business.”

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Maitre'D By Posera

About BAASS Business Solutions Inc.

BAASS is a full service technology firm with twenty-five years of industry experience. With a broad client portfolio, BAASS currently serves over 2000 clients across North America and the Caribbean. With a past record of successful system implementations, BAASS has been recognized within the industry on numerous occasions. Recognitions include being ranked in Accounting World's Top 100 VAR's, Accounting Technology Magazine's Pacesetters Award, two consecutive Business Partner of the Year recognitions from Sage Software Inc, and eight consecutive Sage President's Circle awards for being a top performing Business Partner.

With an experienced team of IT and business application and design consultants, BAASS offers a comprehensive range of services from needs assessment, system design & configuration, software training and technical support in accounting, ERP, CRM, e-business, custom web solutions, specializing in Sage HRMS, Sage CRM, Sage 300, and Sage ERP X3 products.