



Depth of
experience,
reliable results



Ph: 1300 720 767
PO Box 907
Capalaba QLD 4157
www.pbt.net.au



Company Name: Medical Sales & Service

Solution: Sage Pastel Evolution

Industry: Sales/Retail

The Company

Medical Sales and Service has grown considerably since opening the doors in 1975. The business was established to fulfil a need in the Western Australian health care market for the servicing of medical equipment in the areas of anaesthetics, resuscitation, respiratory/oxygen therapy and infant care.

As the business continued to grow, they expanded services to include the sale of medical products to compliment the equipment servicing side of the business.

Information to empower, motivate and integrate!

The Challenge

Medical Sales & Service were using an entry level accounting solution which worked well when the business was small. However by 2005, the business had expanded and the existing accounting package was struggling to perform basic daily tasks. The accounting solution was not integrated with businesses CRM solution and the sales team were left with the laborious task of entering the same information into two separate programs. It was crippling the sales team with additional administration duties and taking them away from face-to-face customer interaction.

Rod Dowding, Sales Manager for Medical Sales and Services, manages a team of sales representatives who are on the road visiting clients regularly. Previously, Rod spent countless hours manually segmenting sales figures to record the sales activity for each team member and each product and service. Upon completing the data segmentation, only then was Rod able to have a true understanding of the profitability of each division to then calculate sales team bonuses based on individual performance.



Medical Sales & Service continued ...

The Solution

Sage Pastel Evolution's General Ledger was introduced for divisional reporting.

Medical Sales and Services has the ability to capture individual sales figures for two divisions within the one client. *'We have a hospital which uses our Service Division as well as purchases from our Consumables Division, so it's important that we keep the two businesses separate but keep them connected to manage and report on the one business'*

Simple CRM & sales force automation are tightly interwoven into Sage Pastel Evolution.

Sales staff have the ability to enter a lead into the system against a prospect. You can create quotations and simply convert the prospect to a customer and at the same time, the quote to an invoice without having to re-key any of the information. *'My sales team are quite happy to work on the system now, they find it quick and easy to write an order, especially since the lead is in there already'*

Sage Pastel Evolution allows you to capture communication with the customer in one area. The information helps sales staff stay informed and manage business relationships effectively and efficiently.

Customisable reporting is simple in Sage Pastel Evolution

Progressive Business Technologies made further customisations to the data grid views to allow Medical Sales & Service to view data in the way they want to see it. By customising the grid view, they have the ability to produce reports quickly and simply.

The Solution continued

This provides a valuable tool when you have several departments and staff members dealing with the one customer.

The Results

Rod has the ability to track the sales team progress on the fly. With deeper insight, Rod can address the changes immediately. *'I can download the report at any time and graph the current sales against each team member and immediately establish if there is a problem. Act on it straight away before it leads to an unsatisfied customer or staff member'*

The sales team have the ability to manage the progression of leads, orders and invoices out on the road. The process facilitates sales momentum which empowers and motivates the team. *'It's important to keep your staff motivated and have the ability to address a drop in sales'. Sage Pastel Evolution provides me with the tools to see this at anytime from anywhere'*

Testimonial

'We were very happy with Progressive Business Technologies and the on-site assistance during the implementation and transition to Sage Pastel Evolution'. Rod Dowding, Sales Manager

visit www.pbt.net.au to view other customer stories.