



# SyncSite Gets CRM Benefits Flowing For Neptune Technology Group

## A Sage SalesLogix Solution

### Customer Information:

**Neptune Technology Group**

**Headquarters:**

**Tallahassee, Alabama**

**Industry:**

**Electronic Equipment Manufacturer**

**Web Site Address:**

**[www.neptunetg.com](http://www.neptunetg.com)**

**Software:**

**Sage SalesLogix**

**O**n a suburban street in sunny southern Texas, the city's water utility truck drives slowly past the tidy homes. Just a few years ago, the driver would stop at each home, hop from the van, find the water meter buried in the front yard, and note the reading on his clipboard. Today the driver never leaves the van. A small receiver mounted on the truck is accurately "reading" every meter and passing the data to a laptop on the van's passenger seat. At the end of the day that data is seamlessly uploaded to the utility's billing program. What used to take six employees the better part of a week now takes one employee less than one day.

Neptune Technology Group creates the products responsible for such efficiency. For 110 years, this innovative company has been manufacturing water meters and meter reading equipment sold to municipalities across the United States, Canada, and Mexico. During those years, many things have changed, but not Neptune's commitment to building strong customer relationships and to providing solutions, not commodities.

### Planning For Success

"Our decision to implement a CRM system was consistent with our desire to understand our customers and to enhance the strong relationships that we currently have," says Chris Knapp, CRM project coordinator at Neptune. "Our old system works great for our accounting requirements, but has limited customer service features and cumbersome support capabilities."

Neptune orchestrated a very methodical approach to the selection of CRM (Customer Re-

lationship Management) software. Key people from each department formed a cross-functional team led by Knapp. Following an exhaustive review of the available CRM solutions and vendors, SalesLogix® and SyncSite were identified as the clear winners. SyncSite and the team started to meet and plan for the conversion, addressing concerns as they arose. Each procedure was documented, and each user's input was sought to identify the "pain points" in the current system. It was decided to first implement Sage SalesLogix for the 22 support staff, with the sales and marketing staff implementation in the second phase.

With such a highly organized and well-prepared client, SyncSite's role in the implementation

was primarily that of project coordinator and advisor. "SyncSite was able to give us excellent direction based on their experience," says Knapp, "They were both accessible and responsive and truly worked in collaboration with us to ensure this project's success."

### Easing The Pain

Difficulties in locating a customer account and any open support tickets was cited as the single biggest drawback of the old system. The only way to find an account was by referencing the ticket number. If a customer called to query the status of an open support call and did not know the ticket number, it would take several minutes of technician time to find the open call. With Sage SalesLogix, it's possible to find an account or a contact by literally dozens of attributes—even the caller's first name. Technicians can quickly see everything about the account: support tickets and their status, products owned, maintenance contracts, and any open



Now Neptune has a CRM solution to match its innovative water meter technology.

RMA (Return Material Authorizations). “This instant access to accounts and open support calls is the single greatest improvement Sage SalesLogix has provided,” says Knapp, “It’s easy to quantify the value of servicing a customer in two minutes instead of ten—in terms of the increased customer satisfaction.” By equipping each technician with the complete picture for each account, Neptune has an efficient support mechanism to deliver rapid, high-quality customer service.

### Contract, Quote & Warranty Tracking

In addition to managing support tickets, Neptune utilizes Sage SalesLogix to track maintenance contracts and product warranties. This has led to huge increases in efficiency and the discovery of new revenue opportunities.

The old system provided no means for tracking maintenance contracts and product warranties. The support technicians would literally have to place a customer on hold and visit the contracts manager who would search paper records to determine whether the support should be billable. Sage SalesLogix makes full contract and warranty information instantly available to each technician. Each item the customer owns is tracked within Sage SalesLogix, including the warranty specifics. By tracking the expiration dates of contracts and warranties, Neptune can proactively notify customers at renewal time. A simple report and an on-screen query show the list of accounts whose contracts are due to expire, providing a dynamic to-do list for the staff. Another report, sorted by salesperson, details which customers have not yet purchased maintenance contracts, thereby identifying new sales opportunities.

Quotes produced by Neptune’s inflexible old system were difficult for customers to read and understand. Four or five pages in length and filled with small type, customers often struggled to even find the items they were being quoted within the document. To make matters worse, those quotes had to be printed and hand faxed to customers, one page at a time. Using Sage



Neptune’s new Contract, Quote and Warranty Tracking System led to huge efficiencies.

SalesLogix, Neptune utilizes a quote template, complete with company logo. Most quotes are now one page long, and appear concise, professional, and informative. The best part, Neptune staff agrees, is that these quotes are now emailed to customers, directly from within Sage SalesLogix, with a copy of the quote appended to the account record for future reference.

### Remote Access

Neptune’s group of implementation specialists travel the nation performing setup, configuration, and training services. These employees also require access to Sage SalesLogix Support to create and maintain support tickets access which is made possible using the Sage SalesLogix Web Client. With a simple Internet connection, and no additional software, these employees are able to access the main database and accomplish their tasks.

### Exceeding Expectations

The goal of Neptune’s Sage SalesLogix implementation was to improve customer service by reducing inefficiencies and streamlining tasks. Were they successful? A survey Knapp distributed to the support staff in the months following the implementation of Sage SalesLogix revealed that 77% of the users found Sage SalesLogix much easier to use, with the remaining 23% rating it at least equal. A full 100% of the users rated the ability to quickly locate accounts as the single most valuable feature.

“It’s in our culture to be successful. We don’t start a project hoping to succeed—we expect to succeed” explains Knapp. “Many factors led to this success, most significant were the planning and preparation we did and the expert advice we received from SyncSite.”

What’s next for Neptune? In just a few months, the team plans to roll out the Sage SalesLogix Sales and Marketing components. *“Our success so far has given us tremendous confidence in Sage SalesLogix and SyncSite; we’re ready to take the next step.”*

SyncSite is a premier provider of Customer Relationship Management (CRM) and Business Intelligence (BI) solutions. Our products and services allow companies to target opportunities that drive business, improve efficiencies, and positively impact the bottom line.

Our strategic, consultative approach to every project ensures a successful implementation that delivers tangible benefits from the start. Combining a high level of technical expertise, superior product knowledge, practical business experience, and proven deployment methods, SyncSite successfully enables companies in a variety of industries to manage their client data and leverage this information to enhance profitability and strengthen customer relationships.



5330 Stadium Trace Parkway  
Suite 100  
Birmingham, AL 35244

5400 Laurel Springs Parkway  
Suite 903  
Suwanee, GA 30024

10641 First Street East  
Suite 200  
Saint Petersburg, FL 33706

(205) 443-1000 • [www.syncsite.net](http://www.syncsite.net)