Thermo-Twin Uses Sage CRM to Increase Growth in Sales

Out-of-Date Information Led to an Underperformance in Sales

Thermo-Twin Industries is a manufacturer of high-quality custom windows, doors, sunrooms, and sidings. The headquarters and manufacturing facility is in Oakmont, Pennsylvania, with other offices and showrooms located in Toledo, Erie, and New York. The company opened its first branch sales office in 1991 and began a period of sustained growth. Through the last decade it consolidated its position, selling window systems that major on being quiet and energy efficient.

Today, the company runs a busy retail and wholesale business alongside its manufacturing operation with around 80 percent of sales going direct to customers and 20 percent to the construction sector. Working off a database of 300 active customers and nearly 1,500 prospects, the business felt it was underperforming in sales due to disjointed systems. "Tracking of customers was archaic and very time consuming," said Dennis LeVan, IT manager. "We had standalone programs on different computers and databases that wouldn't talk to each other."

There was a lot of double entry of data, and it was difficult to retrieve accurate and up-to-date information. Manual reporting from disparate databases made it difficult to measure the effectiveness of sales and marketing strategies.

Up-to-Date Information Was the Norm With Sage CRM

Sage business partner Cat Consulting had successfully implemented Sage CRM for one of Thermo-Twin's suppliers, so the software became the obvious choice, particularly as the two companies planned to integrate their back-office systems to increase efficiencies.

Thermo-Twin merged all its disparate systems and information into Sage CRM, with a single database providing one source of accurate and up-to-date information. This solved fundamental problems, according to Cat owner Jeff Tweardy: "From a service standpoint it had been disjointed. Now everyone had access to the same information, and they could become much more efficient."

Customer
Thermo-Twin Industries

Industry
Manufacturing/Sales

Location
Oakmont, Pennsylvania

System
Sage CRM

Challenge
Disparate databases and standalone systems were hampering sales and making it difficult for management to analyze the business and plan future strategies.

Solution
With a single source of customer data, sales, marketing, and management teams are empowered with easily accessible information that helps them do their jobs more effectively.

Results
Sage CRM has become mission critical for Thermo-Twin, facilitating a 25 percent growth in sales and near-instant reports on where revenue is coming from, now and into the future.

The company bought 27 licenses in the first phase, though the plan is to roll the software out to more of its 125 employees over time. The initial focus has been on sales and marketing. As soon as a lead is generated, it kick-starts a process in Sage CRM that starts with order entry and goes all the way through to financials. The back-office integration with the supplier means sales representatives can immediately give customers a quote from within Sage CRM.

The software has become a central repository for every piece of information around each job. Paperwork for everything from lead testing to building permits is scanned in and stored against the customer files in Sage CRM. Postsale services are also tracked within the system. "We have integrated our whole way of doing business into Sage CRM. It's business-critical software for us and the main hub of what we do," said LeVan.

Better Sales and Better Visibility Thanks to Sage CRM

Since Sage CRM went live two years ago, Thermo-Twin has seen a 25 percent growth in sales. Dennis LeVan puts it down to a significant improvement in the sales pipeline and better visibility of the business through much improved reporting. "At one end, tracking sales has been phenomenal. At the other, we're getting a much better handle of how we spend our dollars and a better feel for what's coming down the pipeline," he said.

Sales have improved partly because field representatives can access Sage CRM from anywhere over the Internet through a web browser. In the evening they use the system to pick up leads to plan the next day's appointments.

Having better visibility, not just into sales but where the leads are coming from, has helped Thermo-Twin rethink its strategies. When it saw that telesales wasn't generating the leads it thought it was, for example, it scaled back the department and spent the money elsewhere to get a better return.

Buy-in from employees has helped make the implementation a success, not just from the sales team, but also from management, who use the data to better inform long-term business strategies in a way that was unimaginable before. Because everyone is entering data into a single system on a day-to-day basis, Sage CRM allows the business to see almost instant reports of sales activity, something that used to take up to a month to compile manually. Dashboards are set up for the management to make instant year-on-year comparisons.

> "Pulling all the data together for any kind of analysis used to be a nightmare, and I would question the overall accuracy of manual reporting. Sage CRM gives us a real quick overview of where we're at and where we're going. It's absolutely excellent software,"
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> —Dennis LeVan, IT manager

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