

## Met Surveys

map out their future with Sage CRM

**Met Survey Ltd** established in 1990 started its life as a small surveying company in Wakefield, Yorkshire.

Operating throughout the UK, **A YhSurveys** has a vast range of experience in the surveying industry, and is a leader in topographical and measured building surveys.

Split into two divisions; Engineering and Surveying, **Met Surveys** reputation is founded on personal service, flexibility, reliability and accuracy. This reputation is sustained by a policy of continuous investment in state-of-the-art technology and training.

“We were looking for a CRM solution that was easy and simple to use and that could provide us with much needed system mapping and automated workflow.”

Over the years **Met Surveys** has expanded through both organic growth and reputation which has enabled the company to develop into 60 + employees and the £3million turnover business it is today.

### The Challenge

**Met Surveys** were using a number of different data sets to manage their customer and prospect data including a variety of access databases. The process of analysing their customer data was time consuming and not user friendly.

Shelley Carter, Marketing Manager at **Met Surveys** explains “When I first joined the company it took me 3 months to consolidate the data I needed for a marketing campaign. This included me having to re-key information from a paper based system which the engineers swore by, but this just made anything from a marketing perspective impossible”.

The company had begun the process of looking for a CRM solution in the past and had purchased ACT but quickly found that it wasn't comprehensive enough for their needs.

Shelley says “We were looking for a CRM solution that was easy and simple to use and that could provide us with much needed system mapping and automated workflow”.

Having used Goldmine with a previous company Shelley contacted her former Goldmine Business Partner **FD Systems** for advice. She didn't want to go down the route of Goldmine as she had found it limiting in its functionality but trusted **FD Systems** to provide the best solution based on the needs and challenges she had identified.

## The Solution

As a result of discussions with **FD Systems** the solution proposed for **Met Surveys** was a 20 user Sage CRM system to be rolled out across the two divisions. The solution met their key requirements of a comprehensive customer database, workflow automation and a simple and easy to use interface.

A project kick off meeting was planned, and work began on implementing the system in April 2007. From the initial kick off meeting and throughout the implementation **FD Systems** worked closely with Shelley and the team at **Met Surveys** to ensure the implementation went as smoothly as possible.

"We underestimated the time it would take to sort out our data prior to getting it into the system and this just proved to me how much we needed this new CRM System. The **FD Systems** Consultant who undertook the implementation was fantastic. He took the time to understand how we wanted the system to work and tailored it to meet those needs"

## The Benefits

**Met Surveys** are now achieving significant returns on investment from their Sage CRM system. It has given the company much tighter control over its customer service processes and identified key cross-selling and up-selling opportunities for them.

"We can manage our contacts and the associated workflow much more closely so that we can follow up on leads within the right timescales. All communications are now recorded so if someone is out of the office it doesn't impact on our ability to respond to a request for information. This is great for our customer service!"

## The Future

Reassuringly for a company that continues to grow in turnover and size, Sage CRM gives them plenty of room to grow over the next few years.

Shelley is delighted that the system she championed has lived up to expectations and that it has the potential to grow with them as the business continues to go from strength to strength. "Sage CRM has proved to be a fantastic investment for us and we are still scratching the surface of what it can offer us. It gives us a consistency to our work which we could never have achieved if we had continued using our paper based system."

Plans for the future include the potential implementation of Sage CRM in their Austrian sister company which provides 3D Modeling Software.

## FD Systems

**FD Systems is one of the largest Sage business partners in the UK. Our expertise covers the full breadth of the Sage product range. In order to service our expanding customer base we have strategically located offices throughout the UK and Ireland. We focus on developing strong relationships with our customers that are built on high levels of expectation and continual delivery of added value.**

To find out more please speak to one of our solutions advisors on **0870 873 4387** or visit **[www.fdsystems.co.uk](http://www.fdsystems.co.uk)**



## Solution Overview

- Improved sales and marketing productivity
- One single complete view of the customer allowing for cross selling opportunities
- Provides enhanced customer service
- Comprehensive reporting
- Expert support from Sage Business Partner **FD Systems**

