Case Study

Sage 300 ERP-CRM Implementation at Esbee Dynamed

Sage Software
Solutions (P) Ltd.

sage **Distributor**

Overview

Esbee Dynamed known in the medical equipment industry for distribution of state-of-the-art medical equipment to government hospitals, corporate hospitals, top surgeons and nursing homes started its operations in 1999, by the father son duo - Subhash Bawa and Aditya Bawa. Esbee Dynamed's association with Sage Software Solutions has resulted in the company, which has 35 years of combined experience in the medical equipment industry, deliver high quality levels of customer support and service delivery.

With its headquarters in Mumbai and region offices at New Delhi, Pune, Ahmedabad, Indore and Lucknow, the foremost requirement of Esbee Dynamed was integration- between the marketing, sales and customer service teams bundled with sales forecast and budgets- that could help the management make strategic decisions on the go.

"With the focus on after sales service quality and processes, presence of a CRM solution would aid us to provide high quality customer support and service to the customers. Additionally, with the company planning to expand both geographical and business wise, a real time view of the entire operations was the need of the hour. Going by the business nature, since the company widely deals with repeat customers, it was essential for Esbee Dynamed to record the transactions and store master data. It was also imperative for us to study the changing trends and plan our role in newly developing business segments" says

Aditya Bawa, Director Esbee Dynamed.

Sage 300 ERP and CRM solution: A Complete Integrated Package

The company's business challenges were answered by one solution- the implementation of Sage 300 ERP and CRM solution that is a 360° solution for the company's business needs. Sage ERP-CRM vertical for Service Industry that includes Sales Force Automation, Service Management Inventory Management and Finance has been configured to cater to the unique ERP and CRM needs of Medical Equipment Distribution and Service Industry

"We chose Sage Software Solutions going by its track record of working in tandem with more than 300 Sage Business Partners and providing state-of-the-art industry solutions for the SME and Large enterprises. Additionally, it has dedicated support centres in Mumbai that is close to the Esbee Dynamed's head office and other locations across India ensuring full support"
- Aditya Bawa
  Director
  Esbee Dynamed

With a strong domain knowledge and product understanding, the solution was

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implemented by Sage Software Solutions in just six months. The steps included Project Pre-Planning, Establishing Business Requirements Baseline, Master Data management, Accpac Environment Implementation, Delivering Forms and Reports, Training, User Acceptance Test and finally Going Live.

"integrated ERP and CRM platform that is scalable and was a perfect fit to Esbee Dynamed's multi-location and multicurrency set up"

> - Kumar Siddhartha
> Managing Director
> Sage Software Solutions Pvt Ltd

"Sage EES is a fully integrated business management solution comprising tightly

During implementation, there were quite a few challenges faced by the implementation partner, the primary being

Challenge

A real time view of the entire operations allowing management to take decisions on the move, high quality customer support and service to the customers, record transactions with repeat customers and store master data and a tool required to study the changing trends that would help in the company's expansion plans

Solution

Implementation of Sage 300 ERP and CRM solution, a 360° solution for the company's business needs.

Result

Sage EES's Sales Force Automation, Highly Focused Marketing tools and seamlessly integrated service management helped Esbee Dynamed to connect to more target customers. The sales users are comfortable with the flexible and intuitive controls of Sage CRM and the way multiple reports are configured.

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the need for Precision in data entry.

"The very reason for this implementation was that the management wanted transparent day-to-day operations and for this the operations team were required to key in real time data in the system. This process took great effort and time because of the previously followed practices in the company and initially required handholding on a regular basis"

> - Jitendra Somani
>   Chief Executive Officer
>   Sage Software Solutions Pvt Ltd.

Also, since the company was using a legacy system, a lot of time was spent on recording data. However, once the documentation was complete, the requirements and proposed solutions served as base for further handholding.

Improved Customer Service aiding in Business growth

Being in high-value equipment business, quick and efficient customer service is of utmost importance for being in the business for a longer period of time. "This particular point was effortlessly taken care of by Sage CRM's Pre and Post service management. Since the company deals in High End Capital Medical Equipment, thanks to Sage EES's Sales Force Automation, it was able to track sales funnel effectively and able to channelise sales effort in the most focussed manner" says Aditya Bawa, Director Esbee Dynamed.

Seamless Integration of Modules

Post implementation of this solution, Esbee Dynamed has unified sales, service and financial data that present a holistic view of the business aiding the management to take steps in the path of growth and profitability. While the finance suit from Sage 300 ERP helped track accurate accounting effects and exchange gain loss variations, the operational suit helped streamline delivery channels and procurements. Predicting trends and then making procurement arrangements as per that allows more liquid cash to be pumped into business expansion and still having just enough amount of inventory to cater to operational requirements possible. Sage 300 ERP's Inventory Control Module attained this using accurate tracking of real time inventory and transactional data with valuation as per company's costing method.

"Post implementation, the sales users are comfortable with the flexible and intuitive controls of Sage CRM and the way multiple reports are configured. The finance team depends on the statutory reports and forms presented by Sage 300 ERP and they have been trained on skills to design their own reports using Financial Reporter for MIS reporting. Finally, the operations users make full use of inventory control modules stock tracking, management and reordering capabilities and sales projection based procurement" says Aditya Bawa, Director Esbee Dynamed.

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He goes on to add that the management is very content to find company level dashboards, which can be configured and modified at run time.

Automatic Report Generation leading to easy usability

Esbee Dynamed's management specifically liked the Financial Reporter tool, which can report any GL related data into direct spread sheets and allows performing all the spread sheet functions like drawing Pie Charts, Bar Diagrams, showing percentage based comparisons and ratios to benchmarks. FR is user configurable, which means the users can define any number of reports as per their liking for presenting all the GL level data- may it be for management reporting or for statutory submissions.

Safe and Secure Solution

Finally, owing to the sync between the client server architecture and the robust program structure, Sage 300 is the safest business solution in terms of data security, profile configurations and 'need to know' basis user access.

The Next Step

Periodic reviews are scheduled by key stakeholders from both sides to identify scope for improvement. "After gaining both tangible and intangible benefits from the implementation of Sage 300 solution, Esbee Dynamed is mulling over upgrades for Sage 300 to V2014" concludes Aditya Bawa, Director Esbee Dynamed.

Customer

Esbee Dynamed

Industry

Medical Devices & Equipments

Users

ERP – 5
CRM - 11

System

• Sage 300 ERP and CRM Solutions
• Inventory Control Module
• Finance Module
• General Ledger
• Sales Order
• Purchase Order
• Document Numbering
• TDS

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