

THE CUSTOMER

**Sector:**

Private

Industry:

Agriculture

Location:

United Kingdom

Profile:

James & Son (GM) Ltd, established in 1850, is a specialist in the provision of co-product animal feeds to the UK agricultural sector. Taking the grain from breweries, the pulp from juicing factories and the peelings from companies such as McCain, the company provides a comprehensive range of products.

The co-products are sold and distributed to farmers all over the UK. The company headquarters are in Wellingborough and the recently set-up logistics centre is based in Woolpit, Suffolk.

With over 150 years experience in the industry James & Son is well-qualified to supply not only proven products but also the best available advice on their feeding, handling and storage.

Solution Technology Stack:

- Microsoft Dynamics xRM
- Microsoft SQL Server
- Microsoft Windows Server
- Microsoft Windows Mobile
- Custom .NET Development



THE CHALLENGE

Sales orders from James & Son customers were traditionally placed using the telephone or fax machine and processed manually by back-office administration staff. Although the previous system worked and has allowed James & Son to trade successfully for 150 years, it was inefficient, time-consuming and prone to human error.

The full sales process involved the regional sales staff going to meet farmers at their business premises. Once they had taken the order for the required animal feed, sales managers would then return to their home office and fax the order to the James & Son headquarters. Upon receipt of the order, the back-office admin team consisting of three members of staff would have to transcribe the contents manually into the IRIS Exchequer accounts system. The order would then have to go through to the accounts department and then to the stock control team to check stock available and confirm a delivery date.

James & Son required a fully automated solution for sales order processing and delivery management together with a customer relationship management system to support future sales and marketing activities. The new system must be integrated with the existing IRIS Exchequer finance system.

To meet the requirements of James and Son's xRM and transport management system Softwerx transformed and adapted Microsoft's CRM platform. Using this adaptive platform Softwerx was able to firstly leverage the vast amount of in built functionality provided in Microsoft CRM and then extend it using the Microsoft CRM Software Development Toolkit and Microsoft .NET and SQL technologies.

Softwerx used the Exchequer Toolkit to create an interface between the Microsoft CRM platform and Exchequer to allow synchronisation of accounting related information.

THE SOLUTION

Every business faces the key challenge of acquiring, servicing and retaining customers. Softwerx proposed a solution based on the customisation of the Microsoft Dynamics CRM application that ensured the maximised revenue potential by integrating sales, services and marketing processes. Working closely with James & Son managers, our business analysts captured the full business and functional requirements for the new system.

Microsoft Dynamics CRM was installed on a dedicated server and was adapted to accommodate the relevant industry-specific information together with the work-flow automation and custom forms to ensure that system was easy to use. A dedicated Transport Management application was developed using the Microsoft .NET framework technology and fully integrated with the core CRM system. An interface with the IRIS Exchequer was enabled to allow the synchronisation of the account related information.

Laptops and ADSL broadband services were provided to the field sales staff to allow them to connect to the centralised CRM application server at the James & Son headquarters. Each of the field sales team can now access the centralised data and sales information for their specific territory. The back-office team now use the Transport Management application to ensure that deliveries are completed on schedule.

Softwerx delivered a fully automated solution for sales order processing and delivery management together with a customer relationship management system to support future sales and marketing activities.

THE BENEFITS

Using the skills of Softwerx, and Microsoft technology, James & Son's sales process has been refined and modernised making the company more efficient, and in turn, more profitable.

- The field sales staff now take their laptops to their appointments with farmers and are able to input orders straight into the system.
- They are then able to replicate the local data to the main server, such that headquarters receive the order electronically and that the admin, accounts and logistics process is quicker and much more efficient.
- The bespoke Transport Management application has demonstrated real value and we can now work on multiple orders at one time to inform our customers of stock levels and accurate delivery dates.

THE CUSTOMERS PERSPECTIVE

"Our new Microsoft Dynamics CRM System has brought us up-to-date and has allowed us to achieve our goals and new levels of profitability."

Mike Chown
Sales & Marketing Director
James & Son

To ensure quicker ROI for the organisation and higher adoption rate by staff, Softwerx compiled comprehensive user manuals by function, department and process.

This, combined with the training that was made available by Softwerx training and support teams, ensured that switchover from the legacy system was as easy and efficient as possible - delivering value to the organisation and its members