

Case Study

2-Way Sync with Tour de Force



Conveyer & Caster Corp.

• Customer Since 2013

• 38 Users

• Infor TakeStock



■ **Location**
Cleveland, OH

■ **Industry**
Material Handling Solutions
Distributor

■ **Website**
www.cc-efi.com

Conveyer & Caster - Equipment for Industry (CC-EFI), of Cleveland, OH, is a distributor of material handling solutions with locations in Ohio, Pennsylvania, and New York. CC-EFI is known for its expertise in providing casters and wheel and conveyer systems solutions, as well as a full-line of general material handling products, including carts, hand trucks, pallet jacks and warehousing products such as shelving and rack and storage systems to a full range of manufacturing, warehousing, and distribution companies. In their organization, they have 38 employees utilizing the Tour de Force system.

Outgrowing their existing CRM system

Towards the end of 2012, CC-EFI realized that they were outgrowing their current ACT! CRM system, which they had been using since the early 1990s. ACT! was limited in its ability to set permissions and user based rules and didn't offer any integration with CC-EFI's Infor TakeStock ERP system. These limitations meant that customer information was being duplicated between ACT! and the Infor TakeStock ERP, which wasn't helping the company to stay organized or to achieve their growth goals.

As CC-EFI began to research new solutions that could handle their growing business, their main criteria for a new CRM solution was that it offered integration to their Infor TakeStock ERP system, integration to Active Directory, and mobile and desktop functionality that would be easy and convenient for their sales team to use. CC-EFI was also looking for a solution that was built on the Microsoft SQL Server database architecture and provided centralized email logging.

After researching multiple CRM solutions, including Microsoft Dynamics CRM, Salesforce.com, and vTiger, CC-EFI found that Tour de Force offered the only solution that was able to meet all of their requirements. For CC-EFI, the key differentiators of the Tour de Force solution were the integration with their Infor TakeStock ERP system, the integrated email logging solution, and the level of engagement and support provided by the Professional Services team at Tour de Force.

“The biggest benefit we’ve seen since implementing Tour de Force is the improvement to our internal communication. We have fifteen outside sales representatives and five inside sales/customer service representatives, and Tour de Force allows everyone to see everything that is happening with our customers. Email Logging really helps with improved communication between departments and the customer, which allows our employees to be much more engaged with our customers and to be more knowledgeable about what is going on with a customer.”

Brian Harrington | IT Director at Conveyer & Caster Corp.

Integration with Infor TakeStock

The Tour de Force solution integrates with CC-EFI’s Infor TakeStock ERP system through the use of the Business System Integration (BSI) Connector, which allowed them to eliminate the disconnect between the CRM and ERP systems. The BSI Connector integrates directly with ERP systems and other databases and imports over 1,000 pre-calculated data points per customer into the Tour de Force database nightly. This integration provides quick and easy access to a wide range of business intelligence, reporting, and analysis, allowing an organization to analyze sales performance and trends that occur at multiple levels across the organization. The BSI Connector currently provides integration with over 40 ERP systems and is continually updated to integrate with additional systems as the demand arises.

For salespeople, ERP integration is one of the biggest benefits of Tour de Force. A salesperson can easily view their customer’s sales history and open and closed orders, giving them the key information they need to approach every customer interaction. Not only can a salesperson view this information, but they can quickly and easily analyze the information for a single account or across an entire region, giving them the ability to identify sales trends and best practices.

Email Logging

Another feature that CC-EFI required was a centralized email logging system. Tour de Force provides an Email Logging feature that is a standard part of the software solution. The Email Logging service captures a copy of all email messages that are sent and received through the mail server and automatically scans the address fields associated with each email message in order to locate a matching Contact or Account in Tour de Force. Once an Account or Contact is located, a copy of that email is automatically saved to the Tour de Force database. Email Logging does not require a user to click an icon, add a specific address to a CC: or BCC: field, send or receive the email from a special screen, or perform any action other than simply sending or receiving an email.

Email logging is extremely beneficial for a sales team and greatly improves internal communication and organization. Many companies typically have limited storage capacity for emails and require users to delete emails once a certain memory limit is reached. With Email Logging, emails that are tied to a specific account do not need to be saved or kept for the future in the user's inbox. The user can simply access the Tour de Force system and view every email related to an Account or Contact, even emails that have been sent to or received by their coworkers.

The Tour de Force Team

The level of engagement that Tour de Force offered was one of the final deciding factors for CC-EFI. While several of the other software solutions that CC-EFI reviewed were able to meet their requirements, they were able to do so only with the use of third party applications or by requiring CC-EFI to find their own developers in order to build out their desired functionality. With Tour de Force, not only was CC-EFI's required functionality a standard part of the software, but they would be receiving support and implementation services directly from the company that developed the software. Brian Harrington, IT Manager at CC-EFI, recalled that "The implementation process was solid and we had a great team. They were on the ball and kept us in the loop at all times. The great thing about Tour de Force was that they understood our business model as a distributor, which really contributed to a smooth implementation."

Benefits for the Sales Team

According to Harrington, "For us, the most useful features in Tour de Force are the sales data, email logging, quoting, and opportunities. The biggest benefit we've seen since implementing Tour de Force is the improvement to our internal communication. We have fifteen outside sales representatives and five inside sales/customer service representatives, and Tour de Force allows everyone to see everything that is happening with our customers. Email Logging really helps with improved communication between departments and the customer, which allows our employees to be much more engaged with our customers and to be more knowledgeable about what is going on with a customer. It used to be that we have to email three different people to get information on an account. Now, anybody can find that information in Tour de Force."

