Customer Case Study

AIRFLOW®

Airflow

Name: Paul Carpenter

Position: Operations Director

What we do: UK based company producing and selling a range of fans and ventilation systems to retail and trade customers.

Key Benefits

1) Reduce time spent on manual orders and admin to increase the efficiency of the team

2) Back office integration means all key business data and processes are performed in one central place

3) Develop and manage quality leads in one place

Pre-ProspectSoft Problems

We struggled with a lack of cohesion between projects, and information was not in one centralised place which made tasks time consuming and inefficient. For example, we created quotes in word, which lead to duplications and high levels of resource to simply process an order. We needed to improve our processes to become more efficient and profitable. Our sales functions and manual admin were top of the list to review— we wanted to spend more time selling and less time on sales admin without having to hire more staff.

The Solution

Because ProspectSoft integrates to our Exchequer accounting system, we now have one central place to perform all our key sales processes. This has enabled us to create quotes and confirm orders with increased speed and efficiency, whilst avoiding human error and duplication.

We can develop quality leads and manage them efficiently using the CRM - they are logged and processed all from one place.

Summary

ProspectSoft has a great culture. We have extremely good communications with them - both over the phone, through our attentive account manager and using the portal.

The solution has helped us manage our customer and business information, it has helped us refine our processes and increased our overall efficiency.

"We have developed our company's use of ProspectSoft to create a solution that improved our processes and reduced administration time; altogether increasing efficiency."

ProspectSoft