

James River Marketing grows its business with Sage CRM

Cabinet designer and distributor builds strong customer relationships



James River Marketing Inc. has enjoyed tremendous early success. In just two years, the cabinetry and countertop designer and distributor has expanded from its Victoria, BC, hometown to service residential contractors, architects, and designers throughout British Columbia, Saskatchewan, and Alberta. As the young company researched Customer Relationship Management (CRM) solutions to help it better track its opportunities, customers, and projects and continue to grow the business, one solution came out on top. James River Marketing trusts its operations to Sage CRM.

Time to formalize sales processes

Gerry Vervoort, managing partner for James River Marketing, recalls the circumstances that led the company to seek out a CRM solution. “With our increase in sales and project complexities, I knew that it was time for us to work differently. We needed better tracking and monitoring of our leads, projects, and customer interactions to ensure nothing fell through the cracks. The informal approaches we had been using were no longer adequate.”

The company researched many CRM solutions, ultimately selecting the cloud-based edition of Sage CRM. “We chose the cloud version of Sage CRM for its affordability, for what it could do to help us with our customer interactions, and how we manage each project,” says Vervoort. “Sage CRM has more capabilities than what we will initially use, but to support our continued growth, we see Sage CRM as the right investment.”

Standardize business processes across the organization

One challenge facing the company was ensuring that each opportunity was accurately tracked and pursued during a time when it was rapidly adding new employees. Along with the growth, the company’s sales processes were also maturing and increasing in complexity.

Challenge

The tremendous growth James River Marketing was experiencing put a strain on its sales efforts. It needed a formalized approach to sales and project management to ensure opportunities were being pursued and customers were receiving the best possible service.

Solution

Sage CRM was selected for its flexibility to the company’s business processes, configurable workflows, attractive price point, and ease of deployment.

Results

Management and staff have an end-to-end view of every opportunity. Easy to scale as new employees are added. Business-specific processes and workflows are standardized and enforced ensuring a consistently high level of customer service. Cloud-based deployment minimizes IT costs and speeds deployment.

Customer

James River Marketing Inc.

Industry

Specialty contractor—cabinetry design and distribution

Location

Victoria, British Columbia

Number of locations

1

System

Sage CRM

“Sage CRM helps us maintain high service levels even as we grow the business.”

Gerry Vervoort, managing partner
James River Marketing Inc.

Verhoort explains, “With our increase in sales, personnel, and project complexities, it was time for us to work smarter. We needed to put our processes and documentation into a CRM solution so that workflows could be standardized, and all details surrounding our communications could be captured. We needed everyone working on the same page. Sage CRM allows us do just that.”

Using Sage CRM, James River Marketing stores all communications and documents in one easy to use and easy to access application. Details of each opportunity, from initial contact through closing the sale are documented in Sage CRM and available for employees and management to review and analyze. “It’s forcing us to work differently and to communicate at a higher level,” says Vervoort. “We can’t afford to lose track of the many small details, otherwise a project can get sidelined in cost or go off of schedule.”

Flexible to support business processes

Vervoort praises the easy deployment, low IT burden, and broad configurability of Sage CRM. “Sage CRM was recommended to me by a couple of IT people I know. What surprised me has been the degree that Sage CRM can be configured out of the box for the workflows we have developed. I was expecting more of a cookie cutter type of product, with limited customization capabilities. Instead, we got a solution with a lot of flexibility that will support our business into the future.”

James River Marketing is able to make various changes and adjustments to the software on their own, to reflect the details of its particular business. “We have built our own business processes into Sage CRM to support all phases of our jobs, from tracking each new potential sale right to the completion of every new project,” adds Vervoort.

Deliver exceptional service

The company also provides design services for its customers and Sage CRM helps facilitate the design cycle as well.

“With Sage CRM, our designers can record and track communications they have with our contractors to ensure that we are best meeting the needs and schedule of each customer,” says Vervoort. “Now they have what they need to start the project. Every minor detail is important, and we cannot afford to miss a step. The designers need to know when to call for the order, whom to call, and when to set up delivery. All those little steps are documented and tracked in Sage CRM, with reminders to keep the process moving. Sage CRM helps us maintain high service levels even as we grow the business.”

Building trust through superior service

James River Marketing is growing its business by providing superior service and quality products backed by a level mutual trust and respect that Vervoort equates to the symbolic business handshake. “I see Sage CRM as a tool that allows us to provide better communication, better follow through, and strong project organization capabilities so that we can successfully complete each job and exceed our customers’ expectations. Most importantly, Sage CRM helps our employees foster the trust and respect that will win us our customers’ loyalty.”

About The Sage Group, plc

We provide small and medium-sized organizations with a range of easy-to-use, secure, and efficient business management software and services—from accounting and payroll to enterprise resource planning, customer relationship management, and payments. Our customers receive continuous advice and support through our global network of local experts to help them solve their business problems, giving them the confidence to achieve their business ambitions. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and entered the FTSE 100 in 1999. Sage has over 6 million customers and more than 12,700 employees in 24 countries covering the UK & Ireland, mainland Europe, North America, South Africa, Australia, Asia, and Brazil.

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