Customer Relationship Management at Whiteboarders

How Exchequer Enterprise makes customer information instantly available throughout the company

"Here is the weekend weather forecast. A trough of very low pressure is coming in from the West, and winds will gust up to gale force 9 throughout the country." Just the sort of day for staying indoors and watching TV, you might think. But if you are one of the world's top windsurfers like David White, this is ideal weather for speedboard racing, as you battle to harness the power of savage winds, with spectacular crashes and reaching speeds of over 50 miles an hour.

Five times World Production Board speed champion, nine times British champion, three times World Record holder, David White is a legend in British speedboard racing. What makes his victories even more extraordinary is that they have all been achieved not on specially designed or souped-up surfboards, but on standard production kit supplied by F2 International, an Austrian company.

In his quieter moments David imports and distributes windsurfing equipment from F2 International via his company, Whiteboarders, based in Brightlingsea, Essex. In four years, he has built up F2 into the UK's top brand with 65 dealers throughout the country.

Since they started in 1996, Whiteboarders have been using the Enterprise accounts package from Exchequer Software Ltd. But in late 1999, with the back office applications such as accounting and stock control running smoothly, David decided it was time to extend Enterprise into the front office to support his customer facing staff: "I expect everyone at Whiteboarders to be able to respond to a customer query. When a dealer rings up about an order or an invoice, anyone should be able to pick up the phone and give them the answer there and then. It's the same with payment issues. I prefer them to be handled by the sales people who are dealing with the customer day-to-day and know the background. I don't want credit control to be the preserve of some separate person in accounts."

The need – a CRM solution

In current IT terminology, what David wanted was a CRM (Customer Relationship Management) solution. Most customer communication is done over the telephone and staff have to be able to answer any questions immediately while the customer is on the line. So the keynote of any effective CRM solution is simple: it is *speed.* Incoming callers need to be immediately identified and routed to the right person; and once a staff member takes the call, they need to be able to access any information about this customer immediately - invoices, deliveries, orders, previous contacts, all within one or two mouse clicks.

Whiteboarders therefore had to add two major elements to the Enterprise system. First, they had to install a telephone system that could be integrated with their computer's Windows NT network. Second, Enterprise had to be integrated with a specialist contact management package that staff could use to automatically dial out over the telephone network, record details of telephone calls and schedule meeting dates.

Exchequer put Whiteboarders in touch with ComTek Accounts Ltd, a specialist supplier of CRM systems. ComTek recommended that they use the contact management package ACT!, which is well-known for its simplicity and ease of use. By the end of 1999 integration of the three elements – telephones, Enterprise and ACT! – was complete and Whiteboarders' new CRM application was born.

How it works in practice

An unusual feature is that every PC at Whiteboarders has two screens. The user works at his current job on the first screen, while the second displays additional information such as messages, or drill down enquiries.

When a dealer rings in, the telephone system picks up the number of the incoming call, and searches for a match in the customer file in Enterprise. Having identified the customer, it then flashes up a message on all the *second* screens on each PC throughout the building that there is a call from dealer X on the line. Dealer X's usual contact will answer the call, but if anyone else wants a word, they know he's on the line and can grab him before he hands up.

When you answer a call, ACT! automatically displays a master screen showing the details of this customer – contact names, address, etc plus notes of all recent conversations. For example, on the customer we're looking at, there's quite a few notes about payment. This dealer is obviously a slow payer and, sure enough, clicking onto the *Credit* icon shows us that he owes £6,000.

Usually dealers will be ringing up to query an invoice, a delivery, a backorder, or to place a new order. This data is all held in Enterprise. One double click takes us through ACT! and into Enterprise and shows the total debt owing. A second double click lists the individual invoices outstanding, while a third can display the line by line invoice detail. This fast drill-down facility is a key feature of Enterprise, as it makes all information held within the accounting system instantly accessible at both summary or detail level.

One useful point to note is that on a single screen PC, a series of drill down windows overlaying each other will usually end up looking pretty confusing. However, by leaving the customer master record unchanged on the first screen, and displaying the drill down screens on the second screen, Whiteboarders have avoided this problem. It all helps to make the system slick and easy to use.

Making outgoing calls

Staff also use the system to make outgoing calls. Highlight any dealer's name and ACT! will then automatically speed dial out through the telephone system. Once you have finished the call to the dealer it is easy to record the details of the conversation, and to enter the *Next Action* date. When this date comes round, the customer will be included in the daily To Do list.

David White: "We don't run a telesales operation, but we do ring our dealers pretty regularly about activities like demo days. We'll take the van, put 25 boards in the back, and visit a lake or seaside resort. Local people come along and we'll take them out to try windsurfing. We'll get our local dealers involved and other brands apart from F2. It generates interest in the sport as a whole."

In the longer term Whiteboarders try to build up an overall profile of each dealer. "Some of our dealers deal with other products or specialise in particular areas. For example, if you're based inland most of your customers will be sailing on a lake, so you won't sell many waveboarders and there'll be more beginners. By contrast, on the South Coast some dealers specialise in high-end equipment. We can record all this information against the dealer account and build up a profile. When we have a new product line or promotion we can quickly identify which dealers are likely to be interested and tell them about it first."

The Enterprise / ACT!-based system has been running since December 1999 and has more than proved its worth. In particular, David White is pleased at the effect on credit control. "When we talk to any dealer on the phone, we can check the debt situation while he's on the line. If there's a problem we can raise the question of payment in a lighthearted, not a pressured, manner and if he queries the amount we can drill down into Enterprise and give him chapter and verse on which invoices are outstanding. I estimate we've reduced debt by about Ł90,000 without having had to force the issue. By this alone the system has already paid for itself."