

# Syncsite Gets Benefits Flowing for Neptune Technology Group



## CHALLENGE

Neptune Technology Group sought to enhance its customer relationships through the implementation of a comprehensive CRM solution.

## SOLUTION

Following an exhaustive review, Neptune selected Infor CRM and Syncsite as the clear winners.

## RESULTS

Customer service levels have improved significantly through instant access to open support calls. Better tracking of maintenance contracts, expiration dates and terms ensures continued revenue stream. Warranty information is immediately accessible, streamlining support calls.



- **Client**  
Neptune Technology Group
- **Industry**  
Electronic Equipment Manufacturer
- **Headquarters**  
Tallahassee, Alabama
- **System**  
Infor CRM™

On a suburban street in sunny southern Texas, the city's water utility truck drives slowly past the tidy homes. Just a few years ago, the driver would stop at each home, hop from the van, find the water meter buried in the front yard, and note the reading on his clipboard. Today the driver never leaves the van. A small receiver mounted on the truck is accurately "reading" every meter and passing the data to a laptop on the van's passenger seat. At the end of the day that data is seamlessly uploaded to the utility's billing program. What used to take six employees the better part of a week now takes one employee less than one day. Neptune Technology Group creates the products responsible for such efficiency. For 110 years, this innovative company has been manufacturing water meters and meter reading equipment sold to municipalities across the United States, Canada, and Mexico. During those years, many things have changed, but not Neptune's commitment to building strong customer relationships and to providing solutions, not commodities.

## PLANNING FOR SUCCESS

"Our decision to implement a CRM system was consistent with our desire to understand our customers and to enhance the strong relationships that we currently

have," says Chris Knapp, CRM Project Coordinator at Neptune. "Our old system works great for our accounting requirements, but has limited customer service features and cumbersome support capabilities." Neptune orchestrated a very methodical approach to the selection of CRM (Customer Relationship Management) software. Key people from each department formed a cross-functional team led by Knapp. Following an exhaustive review of the available CRM solutions and vendors, Infor CRM and Syncsite were identified as the clear winners. Syncsite and the team started to meet and plan for the conversion, addressing concerns as they arose. Each procedure was documented, and each user's input was sought to identify the "pain points" in the current system. It was decided to first implement Infor CRM for the 22 support staff, with the sales and marketing staff implementation in the second phase. With such a highly organized and well-prepared client, Syncsite's role in the implementation was primarily that of project coordinator and advisor. "Syncsite was able to give us excellent direction based on their experience," says Knapp, "They were both accessible and responsive and truly worked in collaboration with us to ensure this project's success."



# Syncsite Gets Benefits Flowing for Neptune Technology Group (continued)

## Neptune Technology

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Chris Knapp, CRM  
Project Coordinator

## MORE

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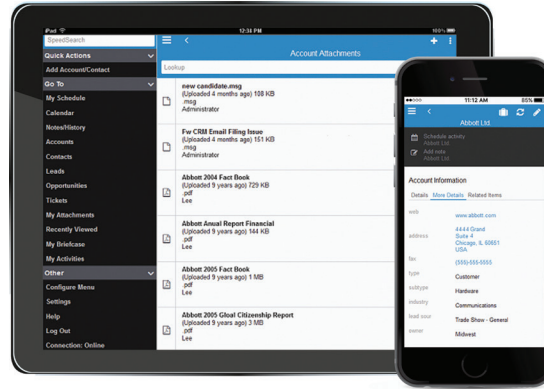
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## EASING THE PAIN

Difficulties in locating a customer account and any open support tickets was cited as the single biggest drawback of the old system. The only way to find an account was by referencing the ticket number. If a customer called to query the status of an open support call and did not know the ticket number, it would take several minutes of technician



time to find the open call. With Infor CRM it's possible to find an account or a contact by literally dozens of attributes, even the caller's first name. Technicians can quickly see everything about the account: support tickets and their status, products owned, maintenance contracts, and any open RMAs (Return Material Authorizations). “This instant access to accounts and open support calls is the single greatest improvement Infor CRM has provided,” says Knapp, “It's easy to quantify the value of servicing a customer in two minutes instead of ten—in terms of the increased customer satisfaction.”

## CONTRACT AND WARRANTY TRACKING

In addition to managing support tickets, Neptune utilizes Infor CRM to track maintenance contracts and product warranties. This has led to huge increases in efficiency and the discovery of new revenue opportunities. The old system provided no means for tracking maintenance contracts and product warranties. The support technicians would literally have to place a customer on hold and visit the contracts manager who would search paper records to determine whether the support should be billable. Infor CRM makes full contract and warranty information instantly available to each technician. Each item the customer owns is tracked within Infor CRM, including the warranty specifics. By tracking the expiration dates of contracts and warranties, Neptune can proactively notify customers at renewal time. A simple report and an on-screen query show the list of accounts whose contracts are due to expire. Another report, sorted by salesperson, details which customers have not yet purchased maintenance contracts, thereby identifying new sales opportunities.

## EXCEEDING EXPECTATIONS

The goal of Neptune's Infor CRM implementation was to improve customer service by reducing inefficiencies and streamlining tasks. Were they successful? A survey Knapp gave to the support staff in the months following the implementation of Infor CRM, revealed that 77% of the users found it much easier to use, with the remaining 23% rating it at least equal. A full 100% of the users rated the ability to quickly locate accounts as the single most valuable feature. “It's in our culture to be successful. We don't start a project hoping to succeed—we expect to succeed” concludes Knapp. “Many factors led to this success, most significant were the planning and preparation we did and the expert advice we received from Syncsite.”

## About Syncsite

Syncsite is a premier provider of Customer Relationship Management (CRM), Field Service Management (FSM), Business Intelligence (BI) and Marketing Automation (MA) solutions. Syncsite empowers companies in a variety of industries to manage their business data and leverage this information to strengthen customer relationships and enhance profitability.



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