

Chelsea instruments Ltd.

Business



Company: Hansa Business Solutions Customer: Chelsea Instruments Ltd.

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has helped technological innovator Chelsea Instruments Ltd come up with a suitably innovative answer to its enterprise systems requirements – starting at the front end. Freelance journalist, Alison Classe investigates. There has been something of an anti-CRM backlash in recent months, with many purchasers of CRM packages reported to have consigned their purchase to a dusty shelf because of implementation difficulties.

In the circumstances, it wouldn't be surprising to find smaller companies fighting shy of CRM projects. However, one 50-strong company, Chelsea Instruments, is nearing the end of a successful project with Hansa Business Solutions, which will result in a solution that integrates CRM with financial and stock management modules from the same supplier. Already, Chelsea Instruments is seeing major benefits in terms of efficiency, productivity and ease of remote working. " It's only eight months since we began working with this system, but we're already certain we made the right decision," says Marketing Director Richard Burt. Chelsea Instruments Ltd, based in West Molesey, Surrey, is a leader in ocean technology. It develops a wide range of oceanographic and environmental sensors, systems and towed undulating vehicles, used by research laboratories, universities and military establishments worldwide.

Its sub-sea pipeline leak detection system is one of the most successful in the world, extensively used by the oil and gas industries. The company also undertakes contract research, development and production for life science companies.

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THE QUEST FOR INTEGRATION

By the late 1990s, Chelsea Instruments had acquired several IT systems. It had an accounting system including sales order processing, a stock control system and, in the sales and marketing area, a contact management database developed using Microsoft Access. But these were all standalone systems, linked only by manual processes.

“ Having outgrown the systems that we had, we weren’t interested in replacing them with another set of standalone packages,” explains Richard Burt. “ We were looking for an integrated answer this time around. We had a growing order book and needed ways to deal with it without increasing our administrative workload. We needed greater efficiency, not more staff.” CRM, in particular contact management, was a priority. “ In the sales and marketing area we needed a system that would enable us to react more swiftly, otherwise we would soon risk losing business.

“ The company’s four sales staff were sometimes so overwhelmed with desk work – such as generating quotes or circulating pre-meeting material – that they didn’t have time to visit customers. “ In our business there’s a direct correlation between sitting in front of customers and orders received: it’s rare to buy £10, 000 worth of equipment over the telephone. So we needed to get our sales people out to those customers.” A new system, Chelsea Instruments believed, might eliminate much of the paperwork, and would allow the sales force to do the administrative parts of their job without the need to keep returning to base.

WHY HANSA?

Chelsea began to look for software that would meet its requirements in the three key areas of CRM, stock management and finance. “ There were surprisingly few integrated solutions around,” Richard Burt recalls.

“ Fewer still were suitable for companies of our size – pricing and complexity put several beyond our reach. There were people offering to integrate their contact management systems with third party solutions for our other requirement areas, but companies we knew who had gone down that route had come to regret it.” Hansa was recommended to Chelsea initially by another software house. “ As soon as we met them it became clear that they were open in their thinking and would be willing to develop their solution in the direction we wanted. They already had strong finance and stock control functionality and were keen to grow the CRM aspect of the system. The solution was also very cost-effective and it cost only a quarter of the price of some of the competing products.

SHAPING CRM

Unusually, Chelsea decided to implement the CRM aspect of the system first, because that was the most pressing need and the weakest aspect of the existing solution. In the first months of 2001, Chelsea worked closely with Hansa to get the solution that it wanted. “ The Hansa people were keen to learn from us and produced regular software updates, often directly in response to requests from us.” Improvements suggested by Chelsea have helped to maximise the usability of Hansa’s CRM module, streamlining the handling of e-mail attachments for example. Eight months of intensive work on both sides have yielded what Richard Burt now considers to be a highly

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effective customer handling system. With the CRM aspect of the system fully bedded in, Chelsea plans to implement the finance and stock control elements of Hansa by early 2002.

The implementation has entailed an exceptionally close working relationship between Chelsea Instruments and Hansa. Chelsea PR Manager Ellen Keegan acts as the company's main conduit for day-to-day communication with Hansa and says, " Their interaction with us is the best I've ever experienced. Take their telephone support, for example. With other software companies, you tend to find the person you normally talk with isn't there and the one you're speaking to can't help, but with Hansa everyone who answers the phone knows what we're talking about. And you're never kept waiting in a queue."

TAKING TO THE ROAD

The Hansa software suite has delivered a number of key business benefits.

" We can now track any enquiry through to the point where it may become an order," says Richard Burt. " If the person who's looking after a client is away, then someone else can take the process forward. It's easy to see all the e-mails, letters and conversations that relate to the customer and quickly understand what is going on." Most importantly, the system has made it much easier to work away from the office. Chelsea's four sales staff now do all their work on-line linking directly to the main system instead of having to synchronise the database on their laptops with a central database. The sales team can connect over a conventional telephone line from home or hotel room, or, if they are at a client's site or in their car, by mobile phone.

They are then able to operate the system in exactly the same way they would if they were in the office. “ Not only have we done away with the chore of synchronisation; we also have a more secure way of working, because all the data collected in the field goes straight on to our central system which is regularly backed up. And sales staff know they’re always working from the latest information – particularly important when we update our price-lists and brochures,” explains Richard Burt. As well as allowing work to be done in the most convenient place, Hansa’s e-mail capabilities have eliminated a lot of paperwork, freeing the salespeople to concentrate on the job of selling. Anything that can be done by e-mail now is – an approach that’s welcome in the scientific environment where Chelsea operates.

“ Scientists have been using e-mail for years and we’ve now reached the point where most of our interactions with the outside world are by e-mail. So the fact that Hansa lets us manage e-mails effectively, and also use them internally, is very important to us.” The efficiencies will multiply once Chelsea has implemented the remainder of the Hansa solution over the coming months. “ With the modules linked together, we will have an enterprise-wide business system that will streamline our business processes. For example, a proposal can automatically form the basis for an order, which in turn forms the basis for job instructions, invoice text and delivery note. By cutting out the re-keying between our separate systems, we’re not only going to save ourselves a lot of clerical effort, but also greatly reduce the scope for error.

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DARING TO BE DIFFERENT

Chelsea went out on a limb with this project in several respects. Working with one of the newer names in the UK software industry, it set out to achieve levels of customer care and automation that had tended to be regarded as the preserve of large corporations. And it dared to implement the “ front office” customer-facing aspects of the system before the “ back office”, in defiance of conventional wisdom. Does Richard Burt have any regrets? “ None at all. We’ve gone straight to the heart of what we needed to do, which is to increase efficiency in dealing with our customers.

And we haven’t looked back.”