

COMPANY	Superior Jetties
LOCATION	Australia
INDUSTRY	Manufacturing, Wholesaling and Distribution
PRODUCT	MYOB EXO Business
PARTNER	Momentum Software Solutions

## New CRM system gives Australian flotation systems business a crystal clear view of their customer pipeline

### COMPANY BACKGROUND

Superior is a multi disciplined organisation with a mission to provide flotation with sustainable solutions to support work, play and life.

The original business has been based on the Gold Coast in Australia for over 25 years and provided marinas, pontoons and docking systems internationally in the recreational marine industry.

In recent years this expertise has been expanded into the SuperiorWork brand of mining and industrial flotation products. The third sector of the vision is SuperiorLife, which encompasses aquaculture, energy systems and water quality improvement.

With an emphasis on personal service, Superior's comprehensive products offer a satisfying customer experience.

### FRUSTRATION AT DUPLICATION

A few months back, Superior Jetties found themselves in the position many businesses do – juggling a number of different systems and processes. This was preventing them from making the most of new business enquiries.

The company had upgraded their financial and business management software about seven years earlier and implemented business management system MYOB EXO – to great success.

But customer relationship management (CRM), an increasingly important element of the business, was still lagging behind. It was being handled by a legacy system called Goldmine, alongside a mish-mash of spreadsheets, books and manual record keeping.

This, according to David Elliott, Finance Manager at the company, was causing a great deal of frustration.

Information was being kept in two, three – sometimes even four different locations, he says, leading to a lot of duplication and a serious lack of visibility. We had to put a stop to it.

## A NATURAL FIT

Superior Jetties turned to MYOB implementation partner Momentum, who suggested implementing MYOB EXO CRM.

“We considered shopping around for alternative systems,” says Mr Elliott, “but we would have spent a lot more on integration in the long run.”

“We knew EXO had a good CRM module. Given the strong relationship we had already with Momentum, and the fact that the two systems would so easily integrate, EXO CRM was a natural fit.”

## MANAGING CUSTOMER EXPECTATIONS

One of the problems Superior Jetties had with their previous set-up was that it didn't allow them to see how individual jobs were progressing. Mr Elliott explains.

“We're not a traditional manufacturing company that produces the same thing day in day out. A large proportion of what we do is customised manufacturing, and that means there are a lot of variables on each job – from the geography of the site itself to the approvals required from local councils and other interested third parties.”

With a clear view of all that information it's easy enough to price a job and manage customers' expectations in terms of manufacturing lead time, approval time, delivery and completion.

Without it, CRM is nothing more than a vague notion.

“Now,” says Mr Elliott, “we've got so much more transparency over bottlenecks, lead times and where exactly a project is in its lifecycle. And we can feed that information back to our customers.”

## SEAMLESS FLOW OF INFORMATION

There's more transparency around clients now, too.

Before, leads and enquiries were slipping through the net. But with EXO CRM, communications are logged from the first point of contact with a customer, right through the sales process and beyond.

“Now,” says Mr Elliott, “our sales people can raise a quote in EXO CRM. If a customer decides to go with us, we can prepare the contracts and initiate the first of three payments – all as part of the same thread.”

At that point, the job actually moves from EXO CRM to EXO's job costing module. Along the way, events are triggered, such as 'sending applications to the council for approval' or 'commissioning the draftsman to start work on the design'. These get ticked off using EXO's task facility.

That's all going on in the background. As far as the customer is concerned however, it's a seamless process.

## THE RELATIONSHIP WITH MOMENTUM

Describing the implementation process with Momentum, Mr Elliott is candid.

“With any installation like this, the devil's in the detail. When we had the initial presentation from Momentum, everything looked pretty straightforward. We could see what EXO CRM was capable of, and it looked fantastic.”

“Once we started getting into the nitty gritty of what we do as an organisation and how that would be reflected in the system, we realised it was going to be slightly more involved.”

“ But Momentum dealt with it very well,” he says, “ walking us through the customisations we needed to make it work ”.

One of those customisations allows Superior Jetties to add multiple site addresses, which is useful for clients who have multiple sites on the go – like developers.

“ The last thing you want to do is deliver a four tonne pontoon to the wrong house! ” says Mr Elliott, adding, “ with all the cranes and trucks involved, that would be a very costly mistake ”.

Another tweak from Momentum allows Superior Jetties to recalculate margins on jobs during the design and specification stage. Previously, if an amendment was made to the design, the sales guys would have to wipe the original specification and start the process afresh. Now, just by clicking save, the job is updated to its latest version.

“ Overall, ” says Mr Elliott, “ Momentum have done a great job. Throughout, they’ve been very efficient and we’re glad to have had them helping us. ”

#### DEALING WITH CHANGE

Asked whether his organisation was ready for the new system, Mr Elliott says,

“ There’s always a bit of resistance with change, but we expected that.

“ In some respects EXO CRM has created more work, but when you consider the transparency it’s given the business as a whole, the software has really made a difference.

“ In the old days, ” he continues, “ the lack of transparency meant people could hide. Now we can see where the bottlenecks are in the process and who’s not closing deals. Naturally there’s a bit of resistance to that. ”

Overall though, Mr Elliott adds, the system has been received very well.

#### LOOKING TO THE FUTURE

Nine months ago, Superior Jetties transitioned Maria Madden into a ‘process improvement’ role. According to Mr Elliott, she was integral to the implementation and did much of the leg work in terms of working with Momentum to get the system up and running.

The next stage in that process is to review other workflows within the business and drive through more improvements.

“ I’m certain EXO CRM will play a key role in this, ” says Mr Elliott.

“ Until then, ” he adds, “ we’re very happy with the seamless flow of information we now have from the initial point of enquiry to the completion of a job. That’s good for business and customers alike. ”