CLIENT
Yocream International, Inc.

SAGE BUSINESS PARTNER
Net@Work
1-800-719-3307
sage@netatwork.com
www.netatwork.com

INDUSTRY
Wholesale Food Products
Manufacturing

LOCATION
Portland, Oregon

Number of Locations
One

Number of Employees
60

SYSTEM
Sage Accpac ERP
Sage CRM

Modules in Operation
- General Ledger
- Accounts Payable
- Accounts Receivable
- Order Entry
- Inventory Control

Third Party Modules
- MISys
- Edisoft EDI

Sage CRM Serves Up Smooth and Consistent Communication at Yocream

Yocream International, Inc., manufactures frozen yogurt mix and smoothie products for wholesale across the U.S. It began in 1977 as a chain of retail stores, then shifted to manufacturing in 1987. The company recently went into partnership with Dannon to sell soft-serve frozen yogurt under the Yocream/Dannon brand. Primary customers include food service distributors who sell to customers at convenience stores, restaurants, schools, and hospitals. The most popular place to find their product is in the food court at Costco as the current signature frozen yogurt, smoothie, and Marionberry sundae. Portland, Oregon is the base of operations for all manufacturing and management staff. As the company grew, outgoing sales reps needed to track all of their contacts in a more visible and efficient way. A long-time user of Sage Accpac ERP as an accounting system, Yocream scooped up Sage CRM to solve their problem.

Sage CRM Breaks the Ice Between Sales Reps and Managers

"The biggest issue we had to resolve was smooth and consistent communication among the sales force," says Brad Gaylor,

Yocream information systems manager. "We have reps all over the country, in Florida, Northern California, and Michigan, while our sales managers are here in Portland. There was no way to know what was going on with everybody. Were they out of town? Who were they seeing? We either had to rely on e-mail or Outlook, so no one knew the other's schedule. It was impossible to monitor any overlap in communication between one rep and a customer, and another rep and potentially the same customer. The problem was definitely costing us in productivity."

Yocream implemented Sage CRM in June 2004. The Sage Software business partner was invited to conduct a training class at the

CHALLENGE
Counter-productive sales activity due to lack of consistent communication between field sales reps and managers located all over the U.S.

SOLUTION
Sage CRM central database accessible to remote sales reps using Sage CRM Solo offline client.

RESULTS
Better management of sales leads and increased sales growth due to increased communication among the sales team.

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Your business in mind.

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ABOUT Net@Work

Net@Work is a leading integrator of accounting, customer relationship management (CRM) and business management software. A Sage Select business partner, Net@Work represents the full range of ACCPAC, MAS and CRM products, specializing in workflow analysis, application development, industry specific customizations and system upgrades. With a staff of 140 plus consultants, developers and hardware engineers, Net@Work supports over 4,000 clients and has received numerous awards for its high level of customer service.

ABOUT SAGE SOFTWARE

Sage Software has been responding to the needs, challenges, and dreams of small and midsized businesses for over 25 years. With a complete range of business management solutions and services, Sage Software helps companies improve customer relationships, reduce costs, and automate and integrate a variety of operational activities. Its solutions support the specialty needs of a broad scope of industry segments, including manufacturing, distribution, construction, real estate, nonprofit, and professional services.

company's annual national sales meeting. "It's been pretty smooth sailing," continues Gaylor. "The biggest gain from Sage CRM is the ability to share customer and prospect databases with all users, and to share ideas. We were aiming to better manage leads and accomplish more sales growth, which we are seeing as a result of Sage CRM."

Individual Servings of Information for Everyone to Share

Yocream has 24 registered users for Sage CRM, including nine using Sage CRM Solo with remote computers. Through synchronization, the Sage CRM Solo Server enables remote users to operate Sage CRM without being connected to the main network. The Yocream remote sales force gets portability and support using Sage CRM Solo on wireless laptops, at home and on the road. Whenever it's convenient the reps connect to the server and synchronize the data, which rapidly integrates the entire sales force providing them with critical real-time information.

"Our sales managers in-house are brought up to speed on what's going on out in the field, and vice versa. It gives them the macro and micro view. They utilize it for following up deadlines, attacking a specific proposal, or rectifying a customer problem. Our rep in Florida knows what our rep in Michigan is doing without having to call. There has been a significant increase in communication among the sales team," states Gaylor.

Since the implementation, Yocream has ordered an additional Sage CRM Solo Server and name user license. An added bonus is now if a laptop crashes, Yocream no longer loses the information on the sales rep's hard drive because it's all been synchronized beforehand with the central database.

Selection Process Melts Away Sage CRM Competition

In Yocream's search for a CRM product, the company ended up looking at two major players in the CRM market. "We chose Sage CRM for several reasons. First, there was an independent networking magazine CRM product review that ranked Sage CRM among the best. Plus we had been working with the Sage Software business partner for four years, who was therefore a known commodity regarding customer service issues. And finally, being a long-time Sage Accpac user, the fact that Sage CRM integrates easily with Sage Accpac was very important. Even though we haven't integrated it yet, having that capability is very positive."

Sprinkled With Useful Features Users Really Like

Sage CRM has a lot to offer, including Sales Force Automation that enables remote reps to access up-to-the-second resources to close sales. It also offers sales forecasting, graphic analysis and reporting, and much more. Gaylor adds, "Most of the users were brand new to this kind of tool. Now that they are use to it, they really like it. Overall, it interfaces smoothly, is easy on the eye, and is easy to use."

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