



Efficient, Quick and Correct Data

Client : Refreshment Systems
Vertical Market : Distribution and Supplies
Requirement : Lead Management
Central Repository
Streamline Operations
Solution: GoldMine Corporate Edition

Benefits to Refreshment Systems of GoldMine delivered by Caltech :

- Effective lead management, with a shorter sales cycle
- Transparency of employee effectiveness
- Employees empowered with tools to do their jobs efficiently
- Enhanced customer experience
- Strategic real time management information

**“GoldMine has offered us capability to do more with less.” Alistair Balmforth,
Managing Director, Refreshment Systems**

Background

Established in 1967 Refreshment Systems supply and maintain operated or self managed beverage and snack solutions nationally throughout the UK. Formerly trading under the three divisional names of Northern Vending Services, Dincup and Cappresso Coffee.

It provides coffee and vending machines – ranging from the latest traditional machines to instant models.

Centralized Information

The initial purchase of GoldMine was in 1999. Refreshment Systems employed an aged accounts system that was being used for accounting and prospecting. Refreshment Systems recognized that newer technology was available with much more capability. It required more real time management information, as well as Sales Reps having the tools to be more efficient and share information.



They contacted Caltech and was impressed with what GoldMine had to offer. Alistair Balmforth, Managing Director explains, "I had researched much about CRM systems and by the mid to late 1990's more attention was being paid to the benefits of such technology. I recognized that we would gain efficiencies by coming away from paper files and having a central repository for information."

When GoldMine was put into Refreshment Systems it was used primarily to manage leads. Over time Refreshment Systems now maintains a very complex system. GoldMine has information feeding into it from two other software systems. GoldMine is the central repository and the place that everyone can see everything about each individual client.

There is only one source to check and use and one truth - and that is GoldMine.

Doing More with Less

Alistair explains,

'GoldMine has offered us capability to do more with less. There are 2 people managing ** representatives each, where 11 years ago it would have required a 2:4 ratio.'

Dan Wooley, IT Director, Refreshment Systems, explains,

'Over the years we have added more capability onto GoldMine through various add on solutions such as QuoteWerks, fax software, GoldReach and so on. GoldMine mainly works the way it did for us 11 years ago. It's user-friendly and it saves us time.'

QuoteWerks has expedited and made the process of creating quotes much more simple. The teams are effective and quick. It's about giving our employees the tools to do their jobs quickly and correctly. There is very little room for manual error.

GoldReach was added to our system requirements in January 2010. This has been a great time saver and also made us even more efficient. To send out direct mails and be able to analyse the results back in GoldMine where the results are actionable is amazing.'

GoldMine is so flexible we can add on to it and take things away from our other operational systems – Dan Wooley, IT Director, Refreshment Systems



Effective Paper-Free Management

Alistair confirms,

‘GoldMine works end to end for Refreshment Systems and has given us a single system that everything else feeds into. Leads are managed effectively and passed easily to our sales representatives who can then see all activity on that prospect to that point. This information is seamlessly passed to installations and then to credit control. It’s an end to end searchable system that gives us all information we need in one place.

There is no doubt that GoldMine has aided our customers’ experience working with Refreshment Systems. For example, when machines are ordered our representatives can find out when the machine without making any calls. All information is dealt with quickly and installs are arranged within 24 hours. This capability has made the organisation much leaner and helped our teams to do things once without problems so that they can get on and do their jobs to a high standard.’

Dan reflects,

‘Compare it to a non computer system with the volume of 200k records... I can’t imagine how we would deal with that information or use the data effectively. Things can be done successfully and efficiently on a larger scale easier and quicker.’

Strategic Benefits

Alistair concludes,

‘GoldMine is much more than a tool for employees although the benefits for them have been immense. The information it holds is a wealth of data for strategic use which is where we have gained an advantage.’

Information once in and many times out in many forms Alistair Balmforth, Managing Director, Refreshment Systems

Future

Refreshment Systems are currently upgrading their GoldMine system from Corporate Edition to GoldMine Premium Edition 8.5. The upgrade will allow much greater functionality of slicing and dicing information as well as a new user interface.

Refreshment Systems are also reviewing products that will allow their employees out on the road to have access to GoldMine.



About Caltech

Established in 1999, Caltech has become one of the UK's leading suppliers and implementers of Customer Relationship Management software (CRM). Based near Leeds, it works with clients to manage their customer contact strategies, operational processes and daily business functions in order to maintain audience loyalty, increase awareness and ultimately drive sales. This is achieved by recommending, implementing, developing and integrating a variety of cutting edge database technologies that are most suited to the brief in hand, including; Microsoft Dynamics CRM, GoldMine, HEAT and ACT! By Sage.

Caltech is able to tailor every system to the specific needs of its clients whether it is an SME or large blue chip organisation and regardless of their IT capability. Long term and successful integration is when CRM works best so Caltech, unlike many of its competitors, is not just a supplier – the team works on an ongoing basis with every client to develop specific systems so they work hand in hand with existing software, from accountants systems to telephony packages, which can be adapted to meet ever changing needs.

Current Caltech clients include; Simply Biz, TNT, the NHS Information Centre and Hays Travel. Customer service is at the very heart of everything Caltech does – it sees clients as partners and is committed to meeting and exceeding expectations in the most effective way possible, leaving a real sense of confidence.

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