



Hilltops IT Case Study

Orb International: the End-to-End Solution

"I have commissioned work with Hilltops IT over the past two years, and this has included installation and training of two different software packages. I found them not only very capable but also very nice people" – Mike Smith, Managing Director, Orb International



Project Brief

Situation

Orb International has been successfully using QuoteWerks for the efficient production of sales quotations for a number of years. To compliment this efficiency and help them continue to retain existing customers and win more new ones, Orb International identified the need to implement a dedicated CRM system for improved management of customer relationships and the sales cycle.

Customer Profile

Orb International is one of the leading suppliers of Corporate and Promotional Merchandise items in the UK, and one of the largest independent Sourcing Houses, servicing many of the biggest blue chip companies. They have built up an enviable reputation for quality, reliability, service and price. Orb International's clients range from some of the biggest companies in the UK to many small niche players. Orb International believes in delivering the right products, at the right time and at the right price and use their years of experience in the industry to provide their clients with the highest possible standard of service.

Business Challenge

Not having a shared central information hub for customers, prospects and suppliers, meant that recording history and scheduling activities was inconsistent from account manager to account manager and therefore from customer to customer. The Orb International management team had no central system to refer to and were therefore not able to quickly or easily obtain a clear overview of the current sales activities in hand. A purpose-built CRM system was therefore needed to help Orb International segment their customers and prospects in order to target marketing effort more proactively and to manage these opportunities through the sales cycle, from initial contact with new prospects through to invoice.

Objectives

Having identified the need to implement a centralised CRM system, it was essential to Orb International that the chosen solution integrates seamlessly with their existing systems (i.e. Outlook, QuoteWerks and Sage). The selected software solution should also fit in with their existing business workflow, enabling Orb to further improve their already successful sales process.



The Solution

Finding the Right Solutions Partner

As Hilltops IT had been involved in the successful implementation of QuoteWerks for Orb International two years earlier, Orb invited Hilltops IT back to manage their ACT! implementation for them, being confident that Hilltops IT would deliver the required functionality and integrate all the systems seamlessly (ACT!, Outlook, QuoteWerks and Sage) and with the minimum downtime to the business. Orb International was also confident that Hilltops IT would be willing and able to customise ACT! according to their specific business needs, and to then tailor the training to meet the varying needs of the different user groups.

Solution

Hilltops IT deployed the premium version of ACT! (ACT! by Sage Premium for Web 2009) which was selected as the best and most appropriate CRM solution for Orb International due to its:

- Comprehensive Contact Management functionality.
- Seamless integration with QuoteWerks, Sage 50 Accounts and Microsoft Outlook.
- Anytime anywhere web-based access for remote users, home workers and managers on the move.
- Powerful reporting and sales forecasting.
- Scalability in terms of additional users as the business grows.

Results and Benefits

Hilltops IT successfully installed, configured and customized ACT! for Orb International in such a way that the Orb team could use their own terminology and segmentation criteria rather than the standard, out-of-the box defaults.

The ACT! implementation benefited Orb International by providing an immediate improvement to their contact management in terms of:

- Shared information and calendars stored centrally providing a comprehensive overview of both historical and future planned activities for each and every customer and prospect.
- Remote access to ACT! enabling the Orb team to remain in touch, up to date and in control of their accounts - even when out of office.
- Powerful sales activity reporting enabling the Orb management team to make more informed business decisions based on accurate sales forecasting.
- Even more efficient customer service leading to even more productive customer relations.



Summary

Orb International

"We recently had one of the team from Hilltops IT at our premises for a week, and her knowledge and effort in installing and training the team was superb – without doubt top class and I would have no hesitation in recommending the team at Hilltops IT. We defined a set of objectives which were delivered within the agreed timescales and these had an immediate positive impact on our business in terms of increased productivity and improved customer service" – Mike Smith, Managing Director, Orb International.

Hilltops IT

"Both QuoteWerks, ConnectIT-Sage and ACT! were enthusiastically received by all the users at Orb because everyone could immediately see how much this software would help them meet their customers' requirements and in so doing achieve their own sales targets" – Stephen Siggs, Managing Director, Hilltops IT.

Project and Service Delivery Timescales

QuoteWerks Consultancy and Training:	July 2007
ConnectIT-Sage Consultancy and Training:	July 2007
Bespoke Development:	July 2007
QuoteWerks and ConnectIT-Sage Support:	July 2007 – date

QuoteWerks Reports Consultancy:	June 2009
ACT! by Sage Consultancy and Training:	June 2009

Software

QuoteWerks:	http://www.hilltopsit.co.uk/quotewerks/
ACT! by Sage:	http://www.hilltopsit.co.uk/act_by_sage/
ConnectIT-Sage:	http://www.hilltopsit.co.uk/connectit/connectit_sage.aspx
SQL Server Express:	http://www.hilltopsit.co.uk/software_development/



More Information

Orb International: <http://www.orbkms.com/>
Hilltops IT: <http://www.hilltopsit.co.uk/>

Software Solutions

ACT! by Sage: http://www.hilltopsit.co.uk/act_by_sage/
QuoteWerks: <http://www.hilltopsit.co.uk/quotewerks/>
ConnectIT-Sage: http://www.hilltopsit.co.uk/connectit/connectit_sage.aspx

Service Provision

ACT! by Sage Consultancy: http://www.hilltopsit.co.uk/act_by_sage/act_by_sage_consultancy.aspx
ACT! by Sage Training: http://www.hilltopsit.co.uk/act_by_sage/act_by_sage_training.aspx
QuoteWerks Consultancy: http://www.hilltopsit.co.uk/quotewerks/quotewerks_consultancy.aspx
QuoteWerks Training: http://www.hilltopsit.co.uk/quotewerks/quotewerks_training.aspx
QuoteWerks Reports Authoring: http://www.hilltopsit.co.uk/quotewerks/quotewerks_reporting.aspx
QuoteWerks Support: http://www.hilltopsit.co.uk/quotewerks/quotewerks_support.aspx
Bespoke Development: http://www.hilltopsit.co.uk/software_development/

Hilltops IT

Hilltops IT was established in 2005 to provide software services and solutions to small and medium sized businesses. Hilltops IT specialises in delivering end-to-end contact management, quoting, ordering and invoicing systems and business intelligence solutions with "off the shelf" products backed up with expert consultancy, training and support services. Hilltops IT also has a proven track record in developing bespoke software solutions, software products, add-on utilities where "off the shelf" products do not completely fulfil a client's requirements and business intelligence solutions.

Our key "out the box" product offerings are QuoteWerks, ACT! by Sage, Microsoft CRM, ConnectIT, Sage 50 Accounts, Sage 200 CRM and Sage 200 Financials and Commercials. We also have an extensive range of product development, custom bespoke development and website projects in our portfolio.

Working with Hilltops IT, you will receive a warm, down-to-earth and professional service which will exceed your expectations.

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