



Hilltops IT Case Study

Sourcing City: contact and product management
with business intelligence reporting

"Hilltops IT has helped us become the clear market leader in our sector; they have taken our business to an IT level way ahead of our competitors. The team there have a knack of putting technical solutions into 'understandable English!' They quickly understand issues and always deliver great solutions. Sometimes I think they care as much about our business as we do!" – David Long, Chairman



Project Brief

Situation

Sourcing City already practiced the principles of customer relationship, supplier and product management very successfully. However, despite having a highly sophisticated sales order processing system and a sourcing website deemed to be the best in the business, Sourcing City had no shared, central system to effectively manage the reams of data they were collecting.

Customer Profile

Sourcing City brings creative promotional merchandise sourcing directly to corporate end user customers. Sourcing City contains numerous sales tools to help you to improve your promotional product creativity. They enable you to source specific products or creative product ideas quicker, saving both time and money. It will also enable you to find products quickly from reliable and quality sources. Items from over 2,500 manufactures and importers are featured on Sourcing City, with over 85,000 individual promotional product ideas immediately available. Sourcing City includes all of the major industry suppliers in the UK, and the products originate from around the world. They offer businesses of all sizes a fast, flexible and affordable solution for finding and growing profitable customer relationships.

Business Challenge

The lack of a dedicated, purpose-built CRM and product management system meant that Sourcing City were using a very time-consuming, manual process to manage website information, which involved exporting data from their current system, reformatting it in Excel before uploading to the website. Sourcing City therefore identified the need to implement a dedicated CRM system that could effectively and efficiently manage vast amounts of data in terms of product information and customer contact details.

Objectives

For the implementation to be considered a success, Sourcing City defined two sets of objectives that needed to be achieved.

For CRM and product management:

- Centralise the maintenance of the business' Company and Contact information
- Centralise the maintenance of the business' Product information
- Implement a system that works seamlessly with their existing systems (QuoteWerks and QuickBooks)
- Implement a system capable of sending mass email campaigns both manually and automated
- Share Contacts and log all communication with customers and suppliers
- Share Calendars to know individuals' movements

For business intelligence reporting:

- Provide a link between the system where they maintain information in-house and the many websites they have (Sourcing City, Sourcing Planet, plus many customer "skin" sites)
- Retrieve information back from the websites for management reporting and market research purposes (product searches, click and enquiries, banner ad clicks, etc)
- Aggregate over 5 million rows of data from 5 different sources into meaningful information
- Provide the industry with insights into market trends in the procurement of individual promotion items and groups of promotional items (e.g. "Pens" are down, but "USB Sticks" are up)



The Solution

Finding the Right Solutions Partner

After inviting a number of companies to tender for the project, Sourcing City again selected the services of their long-standing, existing solutions partner, Hilltops IT, for the following reasons:

- Thorough understanding of the promotional gifts industry, having worked closely with Sourcing City for the last 4 years
- Proven success in building large reporting databases for multi-national, blue-chip companies
- Extensive business and market knowledge of what's important in terms of business intelligence reporting information

Solution

Once Sourcing City had defined their current and future business requirements, Hilltops IT identified Microsoft Dynamics CRM as being the right software solution to meet these requirements, in both the short and in the longer term. Microsoft Dynamics CRM is a very customisable tool which can be used as a platform upon which to build additional future functionality.

The solution implemented included:

- Many and complex customisations to Microsoft CRM - additional entities, java script for data validation, custom menus to web pages outside of the actual Microsoft CRM system to create a seamless environment for the user
- Integration with Outlook for email tracking
- SQL Server 2008 Reporting Services for the reports
- SQL Server 2008 Integration Services to facilitate scheduled data transfers

Since its original delivery, the system has been upgraded from Microsoft CRM 3.0 on SQL 2000 to now being Microsoft CRM 4.0 on SQL 2008.

Results and Benefits

Hilltops IT successfully implemented Microsoft CRM and integrated it with Sourcing City's existing systems with minimum downtime and maximum efficiency. A seamless integration of the back office system to the website was achieved, providing Sourcing City with a more productive and better informed team.

The implementation also provided Sourcing City with the following benefits:

- Shared, central history of all communication with customers and suppliers further improving customer relationships and therefore customer satisfaction and retention
- Robust, reliable systems increasing efficiency and productivity
- Integrated systems enabling automated data transfer processes, saving considerable amounts of time



Summary

Sourcing City

“Hilltops IT has helped us become the clear market leader in our sector; they have taken our business to an IT level way ahead of our competitors. The team there have a knack of putting technical solutions into 'understandable English!' They quickly understand issues and always deliver great solutions. Sometimes I think they care as much about our business as we do!” – David Long, Chairman, Sourcing City

“Hilltops IT has provided exceptional service and commitment to making sure our projects are delivered on time. Their flexible approach has often made the difference to us achieving our deadlines.” – Alistair Mylchreest, Managing Director, Sourcing City

Hilltops IT

“Working with Sourcing City in a very close relationship has allowed us to build from a regular customer / supplier to working as partner which has been beneficial to both businesses. We instinctively work together to take Sourcing City’s business support systems forward with leading edge technology.” – Stephen Siggs, Managing Director, Hilltops IT.

Project and Service Delivery Timescales

QuoteWerks Consultancy and Training:	November 2005 to date
Microsoft CRM Consultancy and Development:	May 2007 to date
Business Intelligence Consultancy and Development:	May 2007 to date
Bespoke Development:	November 2005 to date
Website Development:	November 2007 to date

Software

QuoteWerks:	http://www.hilltopsit.co.uk/quotewerks/
Microsoft CRM:	http://www.hilltopsit.co.uk/microsoft_dynamics_crm/
SQL Server Reporting:	http://www.hilltopsit.co.uk/business_intelligence_and_reporting/
Bespoke Development:	http://www.hilltopsit.co.uk/software_development/
Website Development:	http://www.hilltopsit.co.uk/website_development/



More Information

Sourcing City: <http://www.sourcingcity.co.uk>
Sourcing Planet: <http://www.sourcingplanet.co.uk>
Hilltops IT: <http://www.hilltopsit.co.uk>

Software Solutions

QuoteWerks: <http://www.hilltopsit.co.uk/quotewerks/>
Microsoft CRM: http://www.hilltopsit.co.uk/microsoft_dynamics_crm/

Service Provision

Microsoft CRM Consultancy: http://www.hilltopsit.co.uk/microsoft_dynamics_crm/
Microsoft CRM Development: http://www.hilltopsit.co.uk/microsoft_dynamics_crm/
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/
Website Development: http://www.hilltopsit.co.uk/website_development/website_development.aspx

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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