



### Sales Leads Finally Captured in One System

*Techne's Sales Lead System Integrated to Work with Company Website, Remote Sales*

Techne sells, supports, and services its own scientific instrumentation to hundreds of laboratories, hospitals, and universities in North and South America. Their products are sold through remote sales persons, distributors, as well as online, through their company website. As their business grew, so did their need to centralize all sales activity—but they wanted this new system to integrate with their existing technology. Bright Software Development, having worked for Techne for several years, understood their business model and helped them develop an integrated sales lead system in one week's time, saving them thousands of dollars per year, and effectively giving them their own CRM system.

#### Solution-At-A-Glance

**Company:** Techne Inc.  
(Subsidiary of Barloworld Scientific)

**Industry:** Scientific Instrumentation

**Problem:** Sales leads management ineffective without central system

**Solution:** Build a new sales lead system that integrates with existing systems, effectively giving them their own CRM system.

**Products and Technologies:**

- MS Access
- MS ASP, ASP.NET
- MS SQL Server Database

**Timeframe:** 1 week

**Working smarter:** Tremendous productivity gains realized. Customers better served and thousands of dollars are saved in time employees used to spend in administrative/reporting duties.

#### The Challenge: Capture Sales Activity in One Place to Improve the Bottom Line

All of Techne's remote salespersons "did their own thing" in reporting territorial sales activity, so it was getting harder and harder for headquarters to keep track of sales wins and losses. "We had all these different emails and Excel Spreadsheets to shuffle through, but no integrated approach to tracking sales leads," says Darren Sager, VP of Operations.

As a small business, Techne looked at existing "off-the-shelf" sales lead software packages, but they didn't fit their business model. On the other hand, the more expensive "enterprise" lead programs were expensive and overly-complex for their needs. Plus, Sager knew that whatever sales lead system they purchased would have to integrate with their existing systems to optimize

their technological investment. A custom solution seemed ideal.

### **Why Bright Software**

Sager met with Ray D'Andrade, owner, Bright Software Development to hash out their requirements for a sales lead system. Techne had hired D'Andrade in the past to augment their existing systems—so D'Andrade knew their computing environment, and he understood their business model.

Originally D'Andrade was hired to help Techne enhance a customer tracking database they still use today. Many enhancements have been added over the years. The database, which was reconfigured with a MS Access “front-end” and a MS SQL database “back-end,” captures customer information vital to Techne’s business. It contains customer contact information, product purchase history, product registrations and warranties, as well as customer RMAs (Return Materials Authorization) numbers. Much of the sophisticated scientific instrumentation that Techne sells need periodic calibration, so reports also tell Techne when a customer is due to schedule calibration.

**“ ...I had complete confidence he could build our sales lead system in a cost-effective way. ”**

As part of their ISO 9000 certification, Techne also turned to Bright Software to help them tightly link their public website to their customer tracking database. The website had a shopping cart, but in a week’s time D'Andrade added the ability for website users to automatically calculate shipping in conjunction with data from UPS.com, to generate their own RMAs, to register products, to request literature, or to complete a questionnaire. All the information that customers enter on the public website securely populates Techne’s customer tracking database.

“After working with Ray on our previous projects, I had complete confidence he could build our sales lead system in a cost-effective way,” says Sager.

### **A Integrated System Emerges in One Week**

In one week’s time, using ASP.NET, D'Andrade built Techne’s new sales leads system. The integration of the 1) sales lead system with, 2) their existing internal customer tracking database, and 3) public website, gives Techne their own new CRM system. All three “front-ends” accept information and populate a single database which is backed-up and secure.

User training—always an important factor in deploying a new system—was simplified because the interface was highly intuitive based on the project team’s input. Salespersons from Techne’s various remote sales offices around the world use their web browsers to enter leads, write customer visit notes, and order products and demos. Manager’s can see their progress, assign prospects, and run reports in “real-time,” saving them time. “One of the greatest attributes of the new system is that it can easily grow with Techne’s business. It’s scalable,” says D'Andrade. “And in the end, Techne received a custom solution that cost two thirds less than “off-the-shelf” lead programs.”

With their new CRM system, Techne saves time and has greater control of their business processes. There are fewer reporting errors and they didn’t have to hire more people to create the efficiencies they needed. The entire system paid for itself in one month.

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