Acumatica CRM Fuels 90% Growth and Market Expansion for Religious Book Distributor ComCenter

OVERVIEW

For years, ComCenter distributed educational materials to Catholic schools and churches in a shrinking market using legacy technology to support its operation. The sales team used Act! for CRM and marketing automation to manually reach out to customers via standard mail, email, and phone calls to existing customers at most once or twice per year. ComCenter deployed Acumatica CRM, enhancing customer relationships by tracking communication and automatically distributing relevant sales information. Sales soared with an 8-fold jump in school sales and a 90 percent increase in sales over five years.

KEY RESULTS

- Implemented a single, connected platform with integrated CRM, facilitating an increase in sales by more than 90 percent from five years ago

- Increased school sales 8-fold, boosting company outlook and employee morale

- Gained real-time data visibility and reporting, revealing accurate data for top and most profitable customers

- Optimized customer communication and outreach with integrated CRM and Microsoft Outlook, improving customer experience

- Duplicated and refined sales process, automating sales and marketing communications

- Obtained insight into inventory, improving material forecasting and planning

- Full integration with ComCenter's website, speeding up and streamlining the order process

CHALLENGES

LaSalle Co., which operates as Communication Center (ComCenter), distributes religious education books, bibles, and other devotional materials from 100 publishers to schools and churches. The company started distributing devotional materials in 1970 and expanded into educational curriculum in the 1980s. ComCenter launched limited eCommerce operations in 2003 but the business struggled due to declining religious affiliation across the United States.

In 2016, ComCenter decided to overhaul every internal system except warehouse management.

"At that time, there was a recognition that revenue was declining, and things were headed downhill," says David Salmon, director of information services. "We were running off a UNISYS mainframe acquired nearly forty years ago. The previous system was functional but could not feasibly supply the information we needed. Our CRM and sales efforts badly needed to change."

Repeat sales comprise 70 to 80 percent of ComCenter's revenues but the aging CRM Act! could not effectively nurture customer relationships. Rather, the sales team used Act! to send customers their past order history.

Inability to Access Real-Time Data

"The real issue was all of the customer relationship information was in Act!, but the sales data was in the mainframe," Salmon says. "There was no way to connect the two sources, so people weren't using it. They were not getting fresh data out of Act! The data just lived in the system. It wasn't effective."

Company

LaSalle Co. DBA Communication Center (ComCenter.com)
https://www.comcenter.com/

Industry

Distribution: Religious education books, bibles, and other supplies, mostly Catholic

Number of Employees Approx.

25 full-time employees

Location

South Bend, Indiana

Products

Acumatica Distribution Edition with:

- Inventory and Order Management
- CRM with Outlook integration
- Self-Service Portal
- Avalara Sales Tax Integration
- Velixo
- Microsoft Power BI
- Postal Rate Shopping
- MailChimp

Customer Social Sharing Details

f https://www.facebook.com/profile.php?id=100063907479573

Partner Details

Crestwood Associates
https://www.crestwood.com/

After physically mailing past order history to existing customers, the sales team emailed and called them when they had time. "I'm not sure that every repeat customer got contacted annually. Our turnover rate on prospects was once every few years, and we may have only reached a quarter every year," Salmon says.

ComCenter also used a warehouse management system designed for much larger companies but was affordable. "We are their smallest customer and it's far more than we need, but it does things we like so we've stuck with it over time," Salmon says.

SOLUTION

Acumatica: Flexible, Customizable

Realizing they needed to unlock customer information to drive revenues, ComCenter began looking for an ERP system. The company wanted an easy-to-use solution that was flexible, could connect to third-party applications including its WMS, and offered integrated CRM. They evaluated Oracle NetSuite and Microsoft Dynamics but not Sage. "We looked briefly at them but weren't impressed with the product at the time," Salmon says.

They also reviewed Acumatica, Distribution One, and SYSPRO ERP. "Dynamics was expensive compared to Acumatica, and SAP and NetSuite didn't understand what a small business could spend," Salmon says.

ComCenter chose Acumatica because of its embedded CRM solution, its easy-to-modify reports and dashboards, and its ability to connect to its WMS and its web commerce platform.

"We also loved that we could personalize Acumatica on our own," Salmon says. Acumatica was so easy to use that anyone could access data, filter it, and create dashboards without having to ask the IT team to do it.

"I also liked the fact that pricing wasn't based on the number of users because, during our busy season from June to October, we scale and we didn't want to have to pay (annually) for someone who only uses it for three months," Salmon says. "For a small business like ours, that pricing makes a difference."

Having a single platform for data, including customer data, housed in one place, provided a big selling point.

As part of the implementation process, Salmon and the IT team worked closely with the sales team to define its current sales approach, refine it as needed, and map the resulting processes in Acumatica.

"The sales team had some effective ideas about what worked for communicating with customers, and we could build all of those processes into Acumatica and pull in marketing automation," Salmon explains. "Essentially, customers want to know what they bought before, and extracting that data was slow and tedious before Acumatica."

BENEFITS

Effective Outreach Increases Revenues

The sales team saw results almost instantaneously. "It was hugely helpful to use the capabilities of Acumatica to get in touch with a lot more schools and churches, automating sales processes from what was once a very manual process," Salmon says.

"Now, every school in the country gets at least three sales calls, plus regular emails throughout the year," he says. "We've really turned up the volume of our contact. We're projecting an 8-fold growth in the school segment of our business from when we first adopted Acumatica. Much of that growth has come from having a better CRM in place to manage our customer opportunities and touchpoints."

Acumatica automated many tasks, activities, and email campaigns. Sales teams work primarily in Outlook which is integrated into the CRM. Now all customer interactions are copied to Acumatica in a single click, giving ComCenter a full 360-degree view of its customer behavior, including order and communication contact historical data.

> " We have seen over 90% growth over the past five years, and we expect to see continued growth in the years to come. Acumatica has been a huge part of our success. "
>
> —David Salmon, Director of Information Services, ComCenter

"Since almost everything is recorded in Acumatica, we can easily drill down into the information we need," Salmon says. "For example, our salespeople can see which of their big customers bought in July last year or in the last two years and act on that information. Before Acumatica, it was challenging for them to know which account they should contact, and further which contact at that account they should work with out of a list of 100 contacts. Now, using Acumatica, they no longer ask, 'Are you the person we should talk to?'"

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Tracking 'No' Converts to an Increase in Sales

ComCenter easily set up a task process in Acumatica to track prospect outreach and the outcome of every interaction. This led to an interesting insight into prospects who say 'No' outright and later place an order during the year. "We generate as much revenue from schools who say "No" as we did in total sales to schools at the time we started using Acumatica," Salmon says. "The sales and marketing workflows in Acumatica have made our sales outreach more effective, and we believe it's a major force driving this increase in our revenue."

> " *Acumatica gave us what we needed to have a much more hopeful outlook, which has been a blessing to everyone working here.* "
>
> —David Salmon, Director of Information Services, ComCenter

ComCenter executives used data insights generated by Acumatica to identify potentially stalled sales and other missed opportunities to understand when a salesperson could benefit from targeted coaching. "That's helpful for the sales manager and overall sales," Salmon says. "The president, who personally tracks high dollar accounts, now teaches sales team members how to pursue those accounts more effectively."

Increased Workflow Visibility

Previously, ComCenter managers struggled to recognize when an account rep may need additional help because they lacked access to sales opportunity progress information. "Sales managers now have dashboards to see what's happening across the board in real-time which is key, since sales opportunities are often fluid," Salmon says. "They can easily pull-out key data via generic inquiries that help determine who is top of mind to contact today, empowering sales performance."

ComCenter's operational manager leveraged newly available historical and real-time data to create an Acumatica dashboard that presented several years of weekly results. She also created a report for warehouse staff that showed the shipments and containers processed. "The warehouse staff were stunned," Salmon says. "They had been hearing from others how sales were growing, and the business was getting better, but they never had a way to visualize it in a way that was meaningful to their role. They learned that they processed 25 percent more containers than just one year earlier."

Eliminated Manual Entries, Saving Time

ComCenter previously dedicated 40 hours a week to accounts payable. Now AP takes 10 hours or less to complete thanks to the automated document recognition and approval processes. "There is no paper involved until we are to the point where we issue a check," Salmon says. "Everything is digital and lives in Acumatica."

ComCenter also shaved 75 percent off the time needed to review online orders for accuracy. Previously, employees spent four hours a day reviewing orders based on established review criteria. "We had a meeting with the operations team and refined the criteria and the approval map, which decreased the time to one hour," Salmon says.

Modern Platform Attractive to New Hires

Several ComCenter staff have retired in the past five years. Having a modern, easy-to-use platform that can be accessed from the cloud has helped the company attract employees in what remains a challenging hiring market.

"Previously, as we looked at retirements, we wondered how we would bring someone onto the mainframe, which is intimidating," Salmon says. "We have hired more than a dozen new full-time or part-time employees since we started with Acumatica, and after some initial training on Acumatica, we were able to tell them to dive into it and explore the application because it's so user-friendly."

Improved Material Resource Planning

Acumatica also helped ComCenter navigate supply chain challenges. Executives struggled to ensure they had enough textbooks to meet the schools' needs during their busy season. They wondered if a surge in early-season orders qualified as net new orders or orders placed by proactive schools, hoping to avoid supply chain shortages.

"With Acumatica, we could see how many of those orders came from new customers rather than customers who were just ordering earlier than previous years," Salmon says. "We quickly had a visual in the hands of decision-makers and provided analysis to make that strategic business decision, which would have been impossible before."

The data further revealed that they received the same number of early orders they previously had, and their inventory levels were right on track. "We were getting more business from repeat customers than before, so our sales were being driven by repeat customers buying more, which was encouraging," he says.

"The ability to have data to drive decisions like that has been a huge benefit."

Remote Access to Real-Time Data

Remote sales staff now have access to timely data since the cloud-based solution and mobile capabilities provide anytime anywhere access. "When we had salespeople who worked remotely, it was always a big deal to keep them up-to-date," Salmon says. "We went so far as to have a person in IT schedule a yearly trip to go on-site, in person to see our salesperson in Virginia so we could update his computer and connection. One other salesperson didn't have a connection to the old system and was forced to work offline, so we didn't know what he was working on until he sent us the information."

In addition to connecting to its WMS through Acumatica's API, ComCenter has connected the ERP solution with other third-party applications including its online store, Velixo, Microsoft Power BI, and Mail Chimp. The most important connection is to the company's website, which provides the majority of ComCenter's sales.

"The flow of information with Acumatica is really nice," Salmon says. "Like other small businesses, we get more and more orders online rather than over the phone, and the website is connected to pull data out of Acumatica to keep inventory up to date."

Orders flow from the website to Acumatica. ComCenter then uses Acumatica to track abandoned shopping carts for sales lead follow-up activity. "That's a huge shift to have that option to tap into to further boost sales. Our sales teams can view web orders and abandoned carts with Acumatica data in context, which leads to better decision-making about which opportunities to prioritize." Salmon says.

Increased Morale; Poised for Growth

ComCenter executives expect revenues to continue climbing despite market conditions. "We're projecting a consistent increase in sales over five years," Salmon says. "Acumatica has been a huge success."

"We've reached a point where we have the tools and technology in place to go as far as we want to go. Acumatica has been instrumental in helping us create sales, marketing, and customer relationship management processes. We have seen success and morale improvements across our employee base thanks to that."

ComCenter has a brighter outlook now that everyone has access to a modern platform and data that makes their jobs easier.

"Without this information, one may have the perception that we were in a dying industry with an outlook that was not very good. That is no longer the case," Salmon says.

"Acumatica gave us what we needed to have a much more hopeful outlook, which has been a blessing to everyone working here. Everyone is working as hard as ever, but it's when things are growing that you have optimism that carries you into the future. Our president often talks about our mission, which is to help others teach children about God, and that comes through in everything we do. Our ability to serve others has increased ten-fold, and that's been made possible by going live with Acumatica."