



Greentree CRM leveraged as highly accessible central knowledge base about potentially 37,000+ customers

When this NZ headquartered water systems company launched its innovative polybutylene plumbing system into the Australian market, it leapfrogged its competitors by five years. In so doing, it tapped into a potential customer base of approximately 30,000 plumbers, not to mention architects, builders and inspectors and, that's just in Australia. Add to this around 7,000 or so plumbers in New Zealand and you're talking about needing a Business and Customer Relationship Management system (CRM) with enough grunt to collect, record, invoice, analyse and glean business intelligence from possibly thousands of daily customer interactions.

The business situation

When Jay Wester, Managing Director at Leap Australasia bought its predecessor Hepworth NZ off its UK parent, he inherited a clumsy non-windows based Tier 1 system as part of the deal. Staff had struggled to navigate the system and it didn't cope very effectively with remote access between the 10 Australian offices. Infrastructure costs to maintain the system were high and eventually the remote access strategy was abandoned and replaced with multiple servers. Needless to say, Jay's first task when he took over was to ditch the Tier 1 system and replace it with a cost effective and flexible system that would enable remote access and easy data exchange between offices with significant CRM capability.

Unleash your accountant – confidently delegate groundwork tasks to your junior

Extracting data, performing reasonably complex analysis and producing customised reports using Excel are no longer the bastion of senior financial management staff. These tasks are simplified in Greentree and can be confidently

delegated to the office junior whilst your senior accountant or financial controller is unleashed to perform more strategic tasks like using pivot tables to glean business intelligence from sales data. Jay explains, "we're now using the pivot table and charting capabilities to analyse our sales and profitability effectively." Jay says that being able to create templates and customised reports means that most of the data extraction and analysis groundwork for management reporting can be undertaken by a junior, which is much more efficient use of the accountant's time and expertise.

Did you say 6 weeks to implement? Sure, no problem

There are plenty of horror stories out there about how long and perilous an implementation process can be and many sceptics suggest the CIO/CTO should pick a time frame, double it then multiply by 3 and you might come close. On this occasion, the sceptics were silenced when the Greentree Business partner implemented both software and hardware plus trained all the staff within 6 weeks. Jay admits he was somewhat taken aback when things came in on deadline. "To be honest, six weeks is an extremely short time to implement a changeover," he says. "But really, we had no problems at all. I was extremely surprised as I thought it could easily stretch out for three months – but no, they did it in six weeks just as they said they would."

CHALLENGE >

Leap needed a flexible business management system to effectively support expenditure into the Australian market.

SOLUTION >

Greentree Business Management Suite

RESULTS >

- Rapid deployment - 6 weeks to implementation
- Familiar windows environment smoothes the learning process for users
- Overall positive improvement in key business management areas
- Scalable future proof systems



CUSTOMER
Leap Australasia - Water Systems



INDUSTRY
Construction and Manufacturing of Plumbing Pipe systems



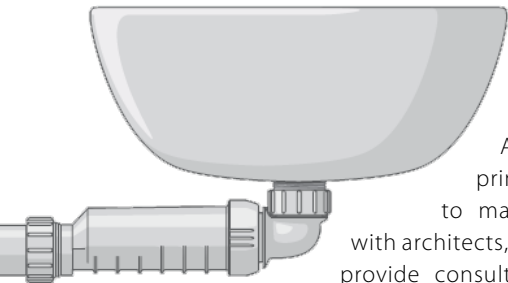
LOCATION
Melbourne, Australia



GREENTREE PRODUCT SUITE
Greentree Financials, Distribution, Job Costing, HR and CRM

"We don't see Greentree as an accounting system we see it as an information system providing high visibility of literally hundreds of critical customer connections".

Jay Wester, Managing Director, Leap Australasia Ltd



Fantastic CRM capability

Jay explains that whilst the 37,000 or so plumbers in Australia and NZ are Leap's primary audience, they also need to manage customer interactions with architects, builders and inspectors. Leap provide consultancy services to architects, builders and new home owners which can

Stability and remote access support from Greentree partner - critical success factors

Jay believes key factors in the success of the project post-implementation, is the stability of the Greentree environment and remote access support from the Greentree partner. This has meant the Leap offices aren't waiting for answers to technology questions and since the Australian offices are logged into the same central server as New Zealand, everyone is looking at the same information.

He says, "Greentree has future-proofed our business by providing a sound business backbone meaning we won't need to re-jig the back-office – Greentree will scale to meet the needs of tomorrow's challenges as they happen".

The future

The sustainability of energy is a globally significant issue, which has implications for Leap management as they tackle the challenges of renewable energy. Jay's confident Greentree's inherent flexibility will enable Leap to scale and make changes to the business model brought about by what he sees as inevitable legislative changes enforcing more efficient construction methods.

include technical diagrams, engineers reports, and plans which can be uploaded to the CRM database. Jay says that Leap staff use CRM as a central knowledge base and he says technical staff in particular, can get the information they want as it relates to individual customers. Since Greentree's integration ensures that financial information is linked to each customer's records, everyone is accessing the same information but within their own customised unique view so they don't need to waste time trying to figure stuff out.

Secure hosting at Greentree partners data centre provides peace-of-mind

It's not until your security company catches some guy running down the street with your server under his arm that the true value of your data 'slaps you around the bank account'. Leap, now have their system hosted at the Greentree Business Partner's secure data centre. "We didn't lose any information, but it became crystal clear to us, just how valuable that data was." Off site hosting provides a number of benefits he says, including the piece-of-mind of knowing their equipment and data is secure from theft and is backed up without the need for specialist IT staff on the Leap payroll. Furthermore, Leap requires a 24x7 support service, which the Greentree Business Partner is able to deliver. This is especially important since Leap need to ensure the 5 hour time difference between offices in Wellington & Perth, doesn't impact upon their customers.

ABOUT LEAP AUSTRALASIA PTY LTD

Headquartered in Wellington, with 10 offices in Australia, Leap Australasia is a leading supplier of quality piping solutions for residential, industrial, and civil applications. Their products include a range of innovative plumbing and civil products. Some well-known projects undertaken to date include the Melbourne Crown Casino and the Endeavour Replica sailing ship.

For more information: www.leapltd.com.au

ABOUT GREENTREE

Greentree International specialises in developing highly effective business management software solutions. The Greentree product has been developed by the authors of CBA, arguably the most successful business software package for small to medium sized businesses in Australia and New Zealand.

In choosing Greentree you are selecting a business system that will truly empower your organisation today and grow with you into the future. The Greentree Partner Network provides a highly skilled local support team that will ensure you achieve tangible business benefits. Greentree has also been recently recognised as a global 'Rising Star' by MIS magazine Australia.

For more information visit: www.greentree.com

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"very, very, responsive!"

