

Top Shelf Found *Top Notch* CRM in Legrand



Case Study Summary

Company Top Shelf Closets & Cabinetry Inc

Location Morgantown Pennsylvania, USA

Industry Manufacturing & installation

Business Challenge:

- To find a way to manage leads and move away from paper based system.
- To find a system to centralize company calendaring and service calls (and respective service history).
- Required a central repository for sales data and history.
- Required a system in which third parties could be assigned to designated customers.
- Required a system that could easily manage multiple users and track entries and changes.
- Top Shelf tried many solutions including QuickBooks Customer Manager, Access Databases and paper files. None of these provided a complete answer to all of the business requirements. Including leads, project management, calendaring, and customer service.

Solution:

- Legrand CRM PRO

Results

- Legrand provided a total business solution to all business and operational requirements
- The reporting capability and information flow has been invaluable
- Allows for consistent scheduling of staff members and designers time
- Allows for tracking of sales leads and sales pipeline
- Job tasks and project bookings are centralized in the company calendar



Business Background:

Founded in 1988, Top Shelf originally provided simple wire shelving to the Chester County community. Today, Top Shelf's state-of-the-art facility produces a full-color line of shelving not only for the Main Line's better homes, but for homes in New Jersey, New York - even as far as Bermuda! For nearly 20 years, Top Shelf's hallmarks (experience, passion and quality) have guaranteed customers the very best solutions for organizing a messy world.

Each customer brings his or her own needs and unique ideas to the drawing board; customers are partners in the design of closets, and are only limited to their imagination. A sampling of Top Shelf's offerings includes: a full-line of colors, wood-grain and stains; sliding drawers, valets, belt and tie racks; units with crown molding, full-length mirrors and jewelry trays; islands with built-in drawers; etched glass-front doors; sports and hobby units for garage or basement; and units with their own built-in lighting system.

Business Challenge:

Top Shelf spent time and money searching for a great CRM that would address all of their needs. Historically, Top Shelf tried QuickBooks Customer Manager, Custom Access databases, and paper files. None of these provided a complete solution to all of the business requirements.

The business challenge was to find a customer relationship management database that would address various issues.

Top Shelf's paper based method of leads management was outdated and ineffective.

"Legrand offered a complete package. Most solutions only offered part of what we were looking for. Legrand's user interface was incredibly easy to learn. Also, the ability to interface with Crystal Reports allowed me to do endless reporting."

Shannon Shaffer
Top Shelf Closets & Cabinetry Inc.

"We also were losing leads because of paper being misplaced." Additionally, as the paper based leads system was self managed, leads could easily fall through the cracks. "We were using calendars and if someone did not update their calendar we would lose a potential customer."

Top Shelf required a system that would allow for a central repository for sales data and history. Staff members from all operational facets of the organization required access to information, and often this wasn't available. *"We also needed the ability to enter sales data into a central location."*

Service calls and appointments are a major part of the Top Shelf operation. Given the nature of the business, service related contacts were required, and information on the timing, nature and involved parties was not being centrally stored.

Solutions Overview:

Top Shelf primary decision to implement Legrand into their business was based on the totality of the solution it provided, and the ease with which it was implemented.

"Legrand offered a complete package."

"Prior to using Legrand we used to lose money because we lost our leads. Now when a lead comes in they are entered in Legrand and a report can be run."

Top Shelf's staff members required minimal training.

"It's really an intuitive product to use. Within in 1 month everyone had a full understanding of the product."

Results:

“Legrand offered a complete package. Most solutions only offered part of what we were looking for. Legrand’s user interface was incredibly easy to learn. Also, the ability to interface with Crystal Reports allowed me to do endless reporting. Most solutions were only offering part of what we need.” Shannon Shaffer, Top Shelf.

“Without Legrand we would fall apart. Legrand enables us to schedule all of our designers’ time. Secondly, it tracks our sales leads and allows us to report on general conversion rates and employee conversions”. This allows for gaps to be identified and worded upon, in addition to rewarding outstanding efforts.

The seemingly effortless task of phone message taking has been streamlined. “Our receptionist using Legrand to enter all messages received”. This has resulted in increased productivity, as names and phone numbers do not have to be consistently recorded.

Top Shelf are utilizing Legrand CRM for management of project tasks. *“We use the task module to make sure all of our job components are completed on time.”* The Legrand Tasks can be assigned to other staff members, and issued with priorities. A work in progress style status also allows staff members and management to see, at a glance, the movements and status of projects.

Top Shelf use the company calendaring function to schedule installations. They are booked in via the Calendar Event function. The detailed information provided within this section includes: the type of event; the person it is assigned to; date and time information; a reminder setting; with which company (customer) the project is associated with; any opportunities, campaigns or customer service issues relating to the project; notes; project code; and finally, allows for the other associated participants to be allocated if required.

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About Legrand CRM

Legrand CRM enables SMEs to capture and integrate information about customers, suppliers, sales and marketing, and share this information across the business. As a result, businesses are able to increase sales from existing customers, strengthen their customer relationships, customer service and drive better sales and marketing decision-making.

Legrand CRM is available in three easy-to-use editions:

- **PRO Edition** provides for a database of up to 15,000 contacts and is targeted at growing businesses with three to 10 users; and
- **CORP Edition** which includes all of the functionality of PRO but is scalable to large corporations requiring five to 50-users.

About Legrand Software

Legrand Software develops customer management and sales operations software systems. It produces and markets Legrand CRM, a leading customer relationship management (CRM) software aimed at 1 to 50 users.

The company was founded in 2000 by managing director, Alain Legrand. Legrand CRM is sold in 26 countries through offices in Australia and the United States and affiliate partners in New Zealand, Britain, Ireland, and Belgium.

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Legrand does not sell direct to customers. It uses a reseller channel distribution model where IT consultants sell, deliver and implement the software. This model enables Legrand Software to focus on product development and marketing.

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