

## Sage 300 ERP and Sage CRM Serve Up Smooth and Consistent Communication at Yocream

Yocream International, Inc., manufactures frozen yogurt mix and smoothie products for wholesale distribution across the U.S. It began in 1977 as a chain of retail stores, then shifted to manufacturing in 1987. The company recently went into partnership with Dannon to sell softserve frozen yogurt under the Yocream/Dannon brand. Primary customers include food service distributors who sell to customers at convenience stores, restaurants, schools, and hospitals. The most popular place to find the product is in the food court at Costco as the current signature frozen yogurt, smoothie, and Marionberry sundae. Portland, Oregon, is the base of operations for all manufacturing and management staff. As the company grew, outgoing sales reps needed to track all of their contacts in a more visible and efficient way. A long-time user of Sage 300 ERP\* as an accounting system, Yocream scooped up Sage CRM to solve its problem.

### Sage CRM Breaks the Ice Between Sales Reps and Managers

“The biggest issue we had to resolve was smooth and consistent communication among the sales force,” says Brad Gaylor, Yocream information systems manager. “We have reps all over the country, in Florida, Northern California, and Michigan, while our sales managers are here in Portland. There was no way to know what was going on with everybody. Were they out of town? Who were they seeing? We either had to rely on email or Outlook®, so no one knew the other’s schedule. It was impossible to monitor any overlap in communication between one rep and a customer, and another rep and potentially the same customer. The problem was definitely costing us in productivity.”

Yocream implemented Sage CRM, and its Sage business partner was invited to conduct a training class at the company’s annual national sales meeting. “It’s been pretty smooth sailing,” continues Gaylor. “The biggest gain from Sage CRM is the ability to share customer and prospect databases with all users and to share ideas. We were aiming to better manage leads and accomplish more sales growth, which we are seeing as a result of Sage CRM.”

\*Sage 300 ERP was named Sage ERP Accpac when Yocream International, Inc. initially implemented this solution. The product names have been updated in this case study to reflect current naming.

### Customer

**Yocream International, Inc.**

### Industry

Wholesale Food Products  
Manufacturing

### Location

Portland, Oregon

### System

#### Sage 300 ERP

- General Ledger
- Accounts Payable
- Accounts Receivable
- Order Entry
- Inventory Control

#### Sage CRM



### Challenge

Counterproductive sales activity due to lack of consistent communication among field sales reps and managers located all over the U.S.

### Solution

Sage CRM central database accessible to remote sales reps using Sage CRM Solo offline client.

### Results

Better management of sales leads and increased sales growth due to increased communication among the sales team.

## Individual Servings of Information for Everyone to Share

Yocream has 24 registered users for Sage CRM, including nine using Sage CRM Solo with remote computers. Through synchronization, the Sage CRM Solo Server enables remote users to operate Sage CRM without being connected to the main network. The Yocream remote sales force gets portability and support using Sage CRM Solo on wireless laptops, at home and on the road. Whenever it's convenient, the reps connect to the server and synchronize the data, which rapidly integrates the entire sales force providing them with critical real-time information.

"Our sales managers in-house are brought up to speed on what's going on out in the field, and vice versa. It gives them the macro and micro view. They utilize it for following up deadlines, attacking a specific proposal, or rectifying a customer problem. Our rep in Florida knows what our rep in Michigan is doing without having to call. There has been a significant increase in communication among the sales team," states Gaylor.

Since the implementation, Yocream has ordered an additional Sage CRM Solo Server and named user license. An added bonus is that now if a laptop crashes, Yocream no longer loses the information on the sales rep's hard drive, because it's all been synchronized beforehand with the central database.

## Selection Process Melts Away Sage CRM Competition

In Yocream's search for a CRM product, the company ended up looking at two major players in the CRM market. "We chose Sage CRM for several reasons. First, there was an independent networking magazine CRM product review that ranked Sage CRM among the best. Plus we had been working with the Sage business partner for four years, who was therefore a known commodity regarding customer service issues.

## About Sage

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. At Sage, we live and breathe business every day. We are passionate about helping our customers achieve their ambitions. Our range of business software and services is continually evolving as we innovate to answer our customers' needs. Our solutions support accounting, operations, customer relationship management, human resources, time tracking, merchant services, and the specialized needs of the construction, distribution, manufacturing, nonprofit, and real estate industries. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 12,300 people and supports more than 6 million customers worldwide. For more information, please visit the website at [www.SageNorthAmerica.com](http://www.SageNorthAmerica.com) or call 866-996-7243. Follow Sage North America on Facebook at: <http://www.facebook.com/SageNorthAmerica> and Twitter at: <http://twitter.com/#!/sagenamerica>.

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**Brad Gaylor**  
Information Systems Manager  
Yocream International, Inc.

"And finally, being a long-time Sage 300 ERP user, the fact that Sage CRM integrates easily with Sage 300 ERP was very important. Even though we haven't integrated it yet, having that capability is very positive," Gaylor says.

## Sprinkled With Useful Features Users Really Like

Sage CRM has a lot to offer, including Sales Force Automation, which enables remote reps to access up-to-the-second resources to close sales. It also offers sales forecasting, graphic analysis and reporting, and much more. Gaylor adds, "Most of the users were brand new to this kind of tool. Now that they are used to it, they really like it. Overall, it interfaces smoothly, is easy on the eye, and is easy to use."