



KEEPING SALES ROLLING

HOW BUDDYCRM HELPED MONK CONVEYORS
KEEP EVERYONE ON THE SAME TRACK





MONK CONVEYORS HAVE USED BUDDYCRM SINCE 2017 TO COMBINE THEIR SALES ACTIVITY AND CLIENT DATABASE TOGETHER INTO A COHESIVE WHOLE ENABLING THEM TO KEEP THEIR TEAMS AT HQ AND ON THE ROAD UP-TO-DATE.

ABOUT MONK CONVEYORS

Monk Conveyors has over 25 years' experience in conveying and handling equipment. They supply and install conveyor systems globally to a wide variety of sectors.

THE CHALLENGES

Monk Conveyors were using spreadsheets to keep track of their sales activity and Microsoft Access to manage the client database. This was starting to become a head ache, as the two products didn't talk to each other.

“We would waste a lot of time hunting around for the information we needed. We needed a system which could host our client database and help our sales team with their day to day activities.”

THE SOLUTION

Monk approached BuddyCRM to provide an integrated solution that would keep track of sales as well as allow the sales team and head office to manage the client database. The combination of having a cloud based CRM and an iOS app enabled secure access to sales data from a PC in the office, or the same power on the go via the app.

IMPLEMENTATION

Every sales team works slightly differently and the sales process at Monk required the BuddyCRM team to implement some custom development to manage those processes.

Monk Conveyors required a specific naming convention of opportunities so they matched an internal quote, warranty and maintenance system that Monk have heavily imbedded in to all their business processes. At the same time Monk were keen to reduce the administration burden on their sales person. To overcome this challenge and ensure accuracy, BuddyCRM developed a bespoke numbering system that automatically names any opportunity when it is created. All the BuddyCRM user has to do is type a single character in the opportunity name field, and the next opportunity name in Monk's sequence will automatically generate – this saves time and ensures accuracy of the naming convention. Now, when tracking and searching for named opportunities across all of Monk's systems, Monk are confident they have accurate information to search on.

THE RESULTS

“The results have been great, we have now migrated away from using spreadsheets to a full integration with Buddy CRM. The switch over was effortless and very well managed by the team at Buddy. Before the update was released to our full team we were able to do a soft walk-through to make sure it would work as expected. This bespoke function has reduced the processing time of our sales enquiries and has actually proved more useful than we first thought.”



To find out more about BuddyCRM

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