



CUSTOMER SUCCESS STORY

CUSTOMER

Smoothie King Franchises, Inc.

INDUSTRY

Retail Franchise Operation

HEADQUARTERS

Covington, Louisiana

NUMBER OF EMPLOYEES

50+

SYSTEM

Sage CRM

Sage CRM Is Perfect Blend For Smoothie King Franchises, Inc.

Back in 1973, Smoothie King's founder blended up a concoction of fruit and protein powder and started a craze. The company now has over 430 store locations in 34 states and Seoul, South Korea.

Jumbled Communication

As a franchise operation, Smoothie King's success depends on communication with potential and existing franchisees. However, the lack of a cohesive system for tracking communication was beginning to threaten growth. Smoothie King staff relied on Microsoft Outlook to store their communications, "We had more than 50 people—all with multiple e-mail folders pertaining to our franchisees," explains Joel Meariman, controller at Smoothie King. "It was unworkable; we needed a way to centralize this information."

Management was concerned that inconsistent information was being shared with franchisees. "Our franchisees might speak to one consultant on Monday and get one answer, and then call again on Tuesday, speak with another consultant, and hear something new," says Meariman.



"We need to deliver consistent corporate messages, and record the results of each customer interaction in order to give the best service possible. Sage CRM lets us do that—and much more."

The Right Mix

The company extensively researched customer relationship management (CRM) software before deciding on Sage CRM. Meariman says Sage CRM supplied the best fit for Smoothie King; a perfect mix of features, functionality, and scalability.

Smoothie King's corporate staff members all use Sage CRM. Traveling team members can access Sage CRM remotely over the Internet.

CHALLENGE

Corporate communication tracked in Outlook was inaccessible to all staff members. Company had no way of ensuring a consistent message to all franchisees.

SOLUTION

Sage CRM delivers a centralized database with complete contact history and storage of all customer-related documents.

RESULTS

Centralized database ensures that corporate communication is consistent, resulting in better customer service. Visibility into the sales pipeline helps keep staff accountable and management informed.

"Sage CRM took the guess work out of our sales process. With a workflow mapped out, we don't miss important tasks. And management can see the current status of each prospect at any time."

—Joel Meariman
Controller
Smoothie King Franchises, Inc.

ABOUT SAGE SOFTWARE

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Automated Workflow

Smoothie King leverages the power of automated processes within Sage CRM to help manage the critical steps that turn a prospect into a franchisee. A Web-to-Lead capture utility sends requests logged on Smoothie King's Web site directly to Sage CRM to begin the qualification process.

With Sage CRM, Smoothie King is able to establish a workflow to track the tasks involved in qualifying a prospect and selling them a franchise license. Staff receives automated reminders of an upcoming task, and once completed, the next task in sequence is activated and the appropriate individual or individuals notified.

"Sage CRM took the guess work out of our sales process," says Meariman, "With a workflow mapped out, we don't miss important tasks. And management can see the current status of each prospect at any time."

Productivity Gains

Now staff can attach financial statements, franchisee agreements, real estate requirements—even photographs of the store locations to a contact record in Sage CRM, and make them accessible to other staff members. There is no need to hunt through file drawers to find a document—all customer-related documents can be viewed onscreen, printed, or e-mailed to a customer as requested.

The franchise agreements can be long and full of legal jargon, but in an electronic format, staff can search a document for a keyword or phrase to answer a customer's question or address a concern quickly.

"The productivity gain with Sage CRM is enormous," explains Meariman, "We are no longer yelling down the hall or wasting time trying to locate correspondence held in an individual e-mail message."

Insight Into Pipeline

Smoothie King's staff uses saved searches in Sage CRM to isolate groups such as open stores, pending stores, or stores located in various territories. This ability to rapidly identify subgroups of prospects and customers gives Smoothie King new insight into its operations.

Management has access to reports that provide a complete picture of the sales pipeline, and where each lead stands. "Before I had to ask every consultant for a list of the leads they were working and the status—Sage CRM has made us more accountable," says Meariman.

In addition to automating its sales processes, Meariman says that having complete contact history improves the communication and service the company provides and showcases Smoothie King's professional yet personalized approach to franchising.

"I feel like we've just scratched the surface of what Sage CRM can do. The more we use it, the more areas we see where it can help us improve. We have over 400 stores now, but with Sage CRM I feel we could grow to 1400 and not reach its limits."