



InnoventCRM eliminates paper record system and drives efficiency for R.J. Cox Engineering

The Client

RJ Cox Engineering is a leading designer, manufacturer and supplier of materials handling and hospitality equipment for the hospitality, medical, manufacturing, mining and engineering industries.

Cox, as the company is known, provides custom-designed and built engineering solutions, as well as an extensive catalogue of products from leading manufacturers of materials handling and hospitality equipment.

With a team of nine people in Sydney – and projects nationwide – Cox required a software solution that could support the business’s current activities and provide a platform for future growth.

“A high volume of our client enquiries are over the phone and through the website, so we needed to make sure that these clients were receiving excellent service and that their enquiries were being managed efficiently,” explains Gail Ross, from Cox.

“Before we engaged InnoventCRM in August 2011, all our processes were paper records, combined with the minimum information that MYOB allowed us to store.

“When one of our staff had a paper job record with them out of the office, none of the other staff were able to work on the job or see any client information, let alone access recent correspondence for that job or client. A paper system can work sometimes, but it has major limitations when it comes to information sharing, efficiency, visibility and volume of transactions.”

Business Challenges

Cox was required to overcome three key business challenges:

- **Firstly**, maintaining data integrity in the transition from manual to a cloud based, paperless system.
- **Secondly**, Cox required a system that would transfer the data currently being captured on the manual paperwork.
- **Thirdly**, Cox needed a system that was easy to use to ensure staff became quickly comfortable with it. The transition from the manual system was paramount so staff adoption of the new system was a key to success.

“Simple jobs were never a problem with a paper/manual system. However more complex jobs were much harder,” Gail explains. “Multiple people working on the one job using paper records was very challenging and unsustainable.”

This is where InnoventCRM came in.





SugarCRM was the right price and offered all the features we needed. InnoventCRM supported us, we would recommend their services to other businesses.

The Solution – SugarCRM with the software connection experience of InnoventCRM

InnoventCRM partnered with Cox to implement SugarCRM, as well as develop an integration between their ecommerce enabled website and MYOB accounting system.

SugarCRM allowed Cox to replace their manual forms with a cloud based CRM system that is accessible anywhere, anytime by multiple staff members simultaneously as required.

“The limitations of the manual forms and the limited fields available in MYOB that were historically being used by Cox were also eliminated,” Gail says.

When staff are out of the office they have the same access to client and job information as the team in the office. All members of staff are able to track client interactions, add data to the client’s records as well as the specific job file and create instant visibility. The problem of multiple contacts and jobs running concurrently for the one client with the old paper system are now a thing of the past.

InnoventCRM also developed customised software that allows seamless connection from the Cox website through to SugarCRM. The connection between SugarCRM and MYOB has also ensured the accounting records and client records are maintained consistently between all systems simultaneously with no staff interaction required, which was never possible before InnoventCRM partnered with Cox.

Business Benefits

SugarCRM has driven efficiency at Cox, allowing paperless collaboration on client information and jobs. In particular, archiving all client correspondence is helpful for complicated projects including warranty and support requests that were previously difficult.

“MYOB only allows us to store one contact per client, which is very limiting with large customers, let alone running multiple jobs simultaneously for the one client,” Gail explains.

“A further benefit has been realised when our part time staff are not at work or staff are on leave. All client and job information is accessible without the need to disturb staff when they are not working. Keeping ‘live’ client records is a key to our business success.”

SugarCRM came at the right price and offered all the features Cox required.

“Sean from InnoventCRM presented to us and displayed immediate knowledge of our business automation needs. This confirmed our choice to engage them as our software and business-consulting partner.

“From our initial business process workshop four years ago with InnoventCRM, we have been very happy with the service. They know SugarCRM and MYOB very well and have really added value to our business and process automation through this CRM project.

“Internally we need to continue to drive staff adoption of the system for all business processes. With their expertise, InnoventCRM continue to encourage and support us with this endeavour also. We would recommend their services to other businesses,” Gail concludes.