

## Sage ERP Accpac Extended Enterprise Suite Delivers Stellar Service to Posera

Posera, Inc. is a leading provider of point-of-sale software and hardware to the hospitality and restaurant industries. Based in Canada and the USA, with offices in the UK and France, Posera serves more than 20,000 customers worldwide through a network of more than 150 active distributors. The company's flagship product, Maitre'D Software, is published in several languages. Posera's unwavering commitment to customer service and continual investment in research and development earn the company an exceptionally high 85 percent customer retention rate. Sage ERP Accpac Extended Enterprise Suite is the solution Posera relies on to sustain and build on its success.

### Integration Is the Order of the Day

The company has grown rapidly over its nine-year history, measured in both organic growth and through acquisition. As it grew, the company found itself struggling to manage several different software packages across various office locations and departments. Allen Shulman, chief financial officer at Posera, recalls the situation, "We knew we needed to invest in an integrated business technology solution that would serve the entire organization. Of primary importance was a 360-degree view of our customers—not just for our sales team, but for our service, support, and accounting-related interactions as well. The front office was our primary concern, yet we also needed a powerful back-office ERP system."

Posera considered three integrated Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) solutions before deciding on Sage ERP Accpac Extended Enterprise Suite. "We performed a SWOT (strengths, weaknesses, opportunities, and threats) analysis involving all three solutions. In the end, we felt the integration in the Sage solution was better. It provided the value, the feature set, and the integration capabilities we were after," Shulman says.

### Strategic Planning Pays Off

The Sage Strategic Sales Group met with the Posera management team, both in person and through web conferences, to work through the company's requirements and the details of how the software could be structured to meet them.

"I appreciated working directly with the software manufacturer during the sales cycle," says Shulman. "I knew we were getting straight answers directly from the source."

Posera has a complex business model. Some divisions work with distributors and others directly with customers. The company also sells point-of-sale hardware, so it must be able to effectively

### Customer

Posera, Inc.

### Industry

Software Development

### Location

Montreal, Quebec

### Number of Locations:

Four

### Number of Employees:

90

### System

Sage ERP Accpac Extended Enterprise Suite



### Challenge

As Posera grew, it increasingly recognized the need for an integrated ERP and CRM solution to provide its international offices with complete, easy-to-access data.

### Solution

Sage ERP Accpac Extended Enterprise Suite provides an integrated, end-to-end business management solution capable of scaling as Posera continues to grow.

### Results

The company is already realizing a 15% efficiency gain and saving significant administrative time. Access to sales, marketing, support, and accounting data provide Posera with a 360-degree view of its business and its

track serial numbers and warranty details. It also provides technical support to its customers and distributors, so it requires the ability to effectively track and manage support calls and create return orders. Sage ERP Accpac Extended Enterprise Suite has proven to be the ideal solution for Posera—flexible enough to handle the company’s unique business processes, with broad functionality to address all of its requirements.

## Companywide Information Sharing

As an opportunity is converted to an order in the SageCRM module, the order is automatically created in Sales Order module. To help customer support staff deliver better overall service, the SageCRM module provides easy access to accounting-related data such as credit terms and recent payments.

A salesperson working in Seattle can generate a service request for a customer, and the software will notify the appropriate support personnel in Montreal. That same salesperson can then monitor the support case to provide a continuity of service Posera’s customers appreciate.

## Monitor Marketing Effectiveness

Using Sage ERP Accpac Extended Enterprise Suite, Posera tracks the source of every opportunity in its pipeline. “We can track a specific sale back to the trade show that generated the lead,” Shulman explains. “We can uncover how many leads that trade show generated, how many resulted in a sale, and the dollar value associated with the sales. This information helps us make the best use of our marketing dollars.”

Management has clear insight of what is in the sales funnel, can evaluate where marketing dollars are being spent, the effectiveness of that spending, and monitor how each member of the sales team is performing. “It’s opened that window between the accounting and sales side of the business that blends everything together,” Shulman says.

## Measure the Savings

Sage ERP Accpac Extended Enterprise Suite is saving Posera time and money—data exchanged between Sage ERP Accpac Extended

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—Allen Shulman,  
Chief Financial Officer  
Posera, Inc.

Enterprise Suite and other applications at Posera eliminates duplicate data entry and provides real-time information to the staff. “For example, in just one position we save about four hours a day in time we used to spend maintaining our licensing databases. Sage ERP Accpac does it for us automatically,” Shulman says.

“People are more efficient, so they are able to get more work done,” Shulman adds. “We’ve only been live for about one year, and we’re already seeing a 10-15 percent increase in our efficiency. That efficiency comes from the companywide access to data. All our information is in one location, which means fewer wasted steps and better, more secure and reliable data.”

## A 360-Degree Solution

In Sage ERP Accpac Extended Enterprise Suite, Posera found a true end-to-end business management solution that delivers the complete customer-focused view it requires.

“We can now see our customer relationships from all angles,” concludes Shulman. “With access to aging, past invoices, open orders, new opportunities, and pending support cases, we really have a 360-degree view of our customers and our business.”

## About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs 4,000 people and supports 3.2 million small and mid-sized business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,400 people and supports 6.3 million customers worldwide. For more information, please visit the website at [www.SageNorthAmerica.com](http://www.SageNorthAmerica.com).