

Sage 200 and Sage CRM makes Caffe Society 80% more efficient





The Challenge

Dennis Ferguson is the Marketing and IT Manager from Caffe Society. He has been working with the business from the very beginning and has been helping to spearhead their digital transformation journey during that time.

Dennis explained, "I've worked at Caffe Society since 2004. Over the years we have grown to become one of the main players in commercial coffee and catering and have over 30 employees.

As a company, Caffe Society has always kept up to date with the latest technologies, but years ago it didn't come under the name of digital transformation, but essentially, that's what it was.

Our digital transformation programme began in 2006. We started slowly and then broadened out our scope which is what I would recommend any company to do. "



Client:	Caffe Society
Contact:	Dennis Ferguson, Marketing and IT Manager
Industry:	Manufacturing & Distribution
Solutions:	Sage 200 & CRM

Caffe Society is a family run business with plenty of experience in the commercial sector, supplying coffee machines, fresh coffee, and other coffee shop essentials to a wide variety of sites, ranging from small corner cafes right through to coffee chains, restaurants and guesthouses. Caffe Society has been in the industry for over 15 years.

The company is on a mission to help their clients realise their full potential and run a successful coffee business. Nothing gives them greater satisfaction than seeing coffee shops and cafes they have worked with turn into a great and thriving business.



Data Silos Impact Customer Experience

Many businesses run on information islands caused by different departments and locations using different systems and processes for recording data. This causes data silos which hamper business growth, kill productivity, halt innovation, create communication problems, and demotivate employees.

The true value of data can only be achieved when it is combined for a holistic view of the organisation. Embracing data as a competitive advantage is a necessity for today's business which is why Caffè Society decided to break down their silos.

Dennis explained, "We had a number of legacy systems in place which were really slow and weren't integrated. This meant that we couldn't get data out of our systems. Well, we could, but that would have taken days if not weeks of effort. "

"This also meant that we spent a lot of time doing double data entry across the various platforms. It also led to it taking us longer to fulfil a customer order."

"In a nutshell, the legacy systems, the lack of integration, inefficient processes and inability to extract the valuable information that we needed in order to make intelligent business decisions were not there."

"Moreover, as we developed and expanded the business, we got to the point where resources were too busy focusing on the customer and didn't have time to manage the systems – so we needed a partner that could help ease the pressure on us with the expertise."

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Reporting is much more accurate and up to date. We can forecast our stocks accurately so that we don't have stock overflow sitting in warehouses.

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Solving The Data Silo Problems With Digital Transformation

“I reached out to Xperience at the start of our journey. When we started talking, I liked their approach to what we were trying to do and I remember thinking at the time that these are great people that I can work with. And we've been working with them ever since.”

“We initially approached Xperience for support with ACT CRM. At that time, we had been supporting it internally, but it had gone beyond our capabilities and skillset in terms of the technical side of things. Xperience was great and really supported us during that time.”

“We were also using Sage 50 which was no longer fit for purpose. We were working beyond its capacity in terms of the number of orders and the number of concurrent users.



There was a lot of double entry as we were inputting data into Sage 50 as well as ACT CRM as the systems were not fully integrated.”



"We spoke with Xperience about the challenges we were facing and working together we decided that Sage 200 and Sage CRM which integrate directly would be a better fit for us. We worked together to make our processes more efficient and it has paid off. "

"Then in 2019, we upgraded to Sage 200Cloud which provided us with more capability and continued to drive us forward on our digital transformation journey as it helped us make Tax Digital where all VAT submissions had to be undertaken digitally."

Sage 200 has provided Caffè Society with the advanced functionality required to fully support the business, with comprehensive and real-time overview of its health and day-to-day operations.

Dennis explained, "Reporting is much more accurate and up to date. We can forecast our stocks accurately so that we don't have stock overflow sitting in warehouses.

We now have a live profit and loss and balance sheet, so we have our finger on the pulse in terms of the financial health of our business. I mean we can get reports almost instantly."

Moreover, with 200cloud as the single source of truth for its data, Caffè Society has excelled in streamlining its processes, cutting year end processing times by 80-90% and data entry duplication by 80%.

Caffè Society Cuts Year End Processing Times And Data Entry Duplication By Over 80%.

Dennis commented, "I remember at year end having to go home and work most of my weekend to make sure that we met the submission deadline. We were so busy focusing on our customers that we didn't have time to do this as part of your day-to-day work."

A close-up photograph of a hand pouring milk from a glass pitcher into a white cup of coffee. The coffee has a golden-brown color with intricate white latte art on the surface. The background is a soft, out-of-focus grey.

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Now, with the new processes and technology, I can process our year end in 2-3 hrs in an evening. With Sage 200cloud our accounts now go directly to HMRC from Sage and we have cut year end processing times by 80-90%.

**Dennis Ferguson,
Marketing and IT Manager, Caffè Society**

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Dennis continues "We have also cut duplicate data entry by around 80%. For me, that's what digital transformation is all about. It's about more efficient processes and integrated technologies that allows you to focus on your customer and not be internally focussed on manual and inefficient processes."

With their digital transformation journey Caffè Society has put their customers at the heart of our business, allowing the company to serve them better and improving the customer experience. Manual processes have been all eradicated, which means that employees have more time to focus on the customer instead of inefficient, internal processes.

"With the integrated CRM and ERP systems, we can now process the order from start to finish within our CRM without going into the Sales Order Processing within ERP."

"The integration has also meant we could not only easily manage more concurrent users at once but also remove silos, saving on data entry as we only have to enter data once."

"With Act we were unable to link various assets to a single company without creating duplicate records. Now we have much more flexibility with CRM as it is much more customisable and we are now able to create a custom entity without duplicating company records."

"Xperience has become like a trusted friend at the end of the phone. We have built a really strong relationship over the 15 years that we have worked with you. If I was to sum up Xperience – a really good company who has helped us throughout our digital transformation journey. You have great people and are incredibly knowledgeable. "



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