

## Case Study

# PinPoint CRM & ERP Software

## The Client

Oak Tree Mobility believe that everyone should be free to live a rich and fulfilling life. This belief affects everything that they do and is reflected in their range of handmade rise and recline chairs, adjustable beds and bath lifts, which have already empowered thousands nationwide to enjoy the independence they deserve.

## Project Overview

Oak Tree Mobility had grown rapidly and their operation used many software products that were independent of each other with no integration; it was a massive hinderance to operational growth. They decided to look for a reliable ERP solution to move their entire business to a platform with all departments connected and sharing relevant information. Our customer believed this could bring a new commercial sharpness to operations. They looked at and tried some off-the-shelf ERP products, but none were 100% suitable. The decision to build a bespoke product to completely meet their needs was decided upon.

Impact IT built a new software with Lead Management, Sales Management, Warehouse, Customer Service and Delivery modules all integrating together. This allowed our client to keep track of all customer information, from lead generation through to sale, delivery, and customer support. With their new CRM & ERP software solution, automated accounting integrated with sales and stock movement integrated with deliveries, reporting and quality management.

## Summary

They saw these immediate benefits:

1. Streamlining of the sales process, making staff more agile
2. Real-time reporting provided more accurate forecasting
3. Invoicing times were reduced, giving greater cash flow
4. Availability of quick and accurate information about sales and customers made organisations more efficient and cost-effective operations
5. Customer support and faster issue resolution enhanced the brand image and trust
6. Customer journey improvements were illustrated with higher customer satisfaction scores



## Key Points

- Oak Tree Mobility had a rapid growth which encouraged their drive for a new CRM and ERP system.
- Oak Tree Mobility used multiple different systems that were all independent causing disconnection within departments.
- Impact IT built a cohesive software and allowed Oak Tree to stay organised.

## Testimonial

“Pinpoint has been a huge help in allowing the business to grow and succeed over the last six years, taking a tricky business problem that was beyond most off-the-shelf systems and turning it into a workable solution that has adapted as the business changes.”

**Chris Baker**

**Talk to us about  
your next project.**

0117 2020 200

info@impactitsolutions.com

www.impactitsolutions.com