

# Customer Relationship Management (CRM)

## Scenario

### ABC Suites (Pty) Ltd

"The aim of marketing is to know and understand the customer so well the product or service fits him and sells itself" – Peter Drucker

#### The Challenge:

At Candy Wrapper's previous company, the CRM system was overly complex, underused, and filled with outdated data. Sales reps avoided it, preferring personal notes and spreadsheets, which led to fragmented customer records, missed follow-ups, and inconsistent service. The system wasn't supporting the sales process—it was slowing it down.

When Candy joined ABC Suites, she wanted a CRM that her team would actually use. Something intuitive, mobile-friendly, and focused on what mattered most: building strong relationships, tracking meaningful interactions, and driving sales through service excellence.

#### How ABC Suites uses epic:

Epic's **CRM** feature gave ABC Suites the simplicity, structure, and visibility needed to turn customer engagement into a strategic advantage.



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**Mobile-First Logging:** Sales reps now log interactions with customers instantly via the Epic mobile app—whether it's a call, meeting, or follow-up. No more end-of-week write-ups or forgotten conversations.

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**Weekly Sales Reports:** The system automatically generates weekly reports based on logged activity, freeing reps from manual reporting and giving managers real-time insight into customer engagement.

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**Unified Customer View:** Every team member sees the same up-to-date customer profile, including interaction history, preferences, and open opportunities—supporting continuity and collaboration across the sales team.

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**Improved Teamwork:** With shared visibility, Celia Fate (Commercial/Sales Director) observed stronger mutual support and coordination across her team. Reps help each other close deals and maintain consistent service standards.

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**Service-Driven Growth:** With better tracking and follow-through, ABC Suites saw a measurable increase in customer satisfaction (Net Promoter Score) and a corresponding uplift in sales performance.

The result? A CRM that doesn't just store data—it drives behaviour. Sales teams spend more time with customers, less time on admin, and deliver service that sells.

***“From complexity to connection—Epic’s CRM feature helped ABC Suites turn customer relationships into revenue.”***