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Cliff Wells

Director of Sales, Ridge Tool

Ridge Tool Transforms Lost Opportunities into Sales — with CardScan for Microsoft CRM

When Ridge Tool Company migrated to Microsoft CRM, they knew they needed to do something else better as well: contact capture. After all, even the best CRM system will fail, especially in terms of sales and marketing performance, if the right information on prospects and customers is not inputted on a regular basis.

For Ridge Tool, the roadblock to making this happen was the mountain of business cards collected in the field each week. Salespeople were naturally reluctant to spend valuable selling time keying in the information. And because typing skills were all over the map, errors occurred. The result? Contact profiles in the CRM database were often missing, incomplete or inaccurate. But today that problem is solved. Thanks to a solution that is fast becoming the best practice for CRM data entry: CardScan.

“It all added up to one overriding problem for us,” says Cliff Wells, Director of Sales. “Lost opportunities.”

Bottleneck in the new CRM system

An industry leader for 80 years, Ridge Tool is the company behind the well-known Ridgid® brand of pipeworking equipment and tools. Selling almost exclusively through distributors, their products are popular among plumbing, heating, electrical and mechanical contractors worldwide.

“When we decided to replace our old CRM system earlier this year,” says Wells, “we realized we needed to find some way to get our salespeople’s fingers off the keyboard.”

Throughout North America, the Company employs more than fifty salespeople. All actively call on distributors, demonstrate products, attend trade shows, and meet contractors during “Counter Days” (held at distributor locations). During a typical week, dozens, even hundreds, of business cards are collected. All must be integrated into the CRM system in a timely fashion. As a result, the risk of sales opportunities falling off the radar screen, or not being identified at all, were high.

RIDGID®

Problem:

Lost sales and marketing opportunities due to missing, incomplete or inaccurate CRM data.

Solution:

CardScan

Results:

Dramatic increase in quality and quantity of CRM data inputted.

Significant improvement in sales and marketing performance.



“Our salespeople work on the road, and in very busy contact situations,” says Wells. “Finding the time and place to read business cards and type in information — without making any mistakes — is difficult at best. Often, it’s just not a realistic expectation.”

Slowdown in marketing

But Sales was not the only department affected by this escalating data entry bottleneck. Full and accurate contact profiles were crucial to the success of Marketing as well.

“For example,” says Wells, “if we had a featured product for mechanical contractors, we wanted to be able to reach into our CRM system and get in touch with these folks with some sort of marketing initiative. But if all we had were just names, and didn’t know if they are plumbers, electricians or whatever, the opportunity was lost.”

To make matters worse, new product development also suffered from a less than robust and accurate database. “Our marketing department needed the latest information on end-users to understand their needs and recommend new products,” says Wells. Future sales growth depended, to a major extent, on identifying trends and market demands, and responding with new product innovations.

Overall, data capture was such a serious issue that, if left unresolved, would have made it impossible for the Company to realize the full benefits of their new Microsoft CRM system.

CardScan was the solution.

Capturing data from the field

CardScan quickly and accurately reads information from a business card and transfers it into the appropriate fields within the CRM interface. Using proprietary interpretive technology — the result of over eleven years of internal development — each unit captures the printed text as digital data, and then automatically sorts street address from email, phone from fax, title from name, and more, with incredible accuracy.

From an IT standpoint, the solution integrates effortlessly — with little, if any, strain on IT resources. The system is VeriText® approved for the highest level of interoperability and compatibility. No wonder CardScan has a reputation as “the fix” for CRM data entry bottlenecks.

User adoption is extremely high, even enthusiastic, and training takes less than five minutes. Just slide in a business card — and it works! “We introduced these units at our National Sales Meeting,” says Wells. “And, before the event was over, all of our salespeople were asking for one.” CardScan, in fact, with its remarkable ease-of-use, has helped accelerate the acceptance of the entire CRM program.



No more lost opportunities

“Nucleus found that companies using an automated data entry point such as CardScan for CRM could increase the volume of contact information captured by 10 to 20 percent.”

- Nucleus Research

[\(Download this white paper\)](#)

Increased sales and marketing performance

Today, CardScan is an integral part of Ridge Tool's Microsoft CRM system. Although it has only been a short time since implementation, the company is already reaping the benefits:

- Data capture and integration into the database is considerably more reliable, complete, accurate and timely. This is expected to make sales and marketing initiatives even more successful.
- There is no longer any resistance to inputting data from business cards collected in the field. Leads don't get lost. Opportunities are acted upon sooner.
- Salesforce productivity has improved. The team now spends more time building new relationships with distributors and contractors, which drives greater sales volume.

Overall, CardScan is helping Ridge Tool make their hopes for the new CRM system a reality. A lot sooner than they had expected. The company is so impressed, in fact, that it has recently decided to expand its CardScan program globally; starting with an order for twenty-five additional units for its South American operations.

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A note about CardScan

CardScan offers a variety of solutions, including products designed specifically for use with major CRM systems such as [Microsoft Dynamics for CRM](#), [SalesLogix](#) and [Salesforce](#), as well as such workgroup systems as [ACT! Premium](#) and [GoldMine Corporate Edition](#). CardScan solutions are used by more than 650,000 corporate and individual users worldwide.

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