

# A view to a kilt

Lochcarron clothes the planet in plaid, but found its client and prospect information wasn't measuring up. Solutions provider Kelros had the answer

**W**hen Sean Connery needs a new kilt, he orders one from Lochcarron, a company based in Galashiels, Scotland, that boasts the world's largest collection of tartans and plaids. Lochcarron has turned a local speciality into a cottage industry for the Global Village.

Wherever you buy tartan, the chances are you're buying a Lochcarron product, and the company doesn't stop at kilts. It also makes and sells the sporrans, belts, shoes, socks, ties and scarves that go with them. So any customer for one item is a prospect for a range of trimmings. Any retailer will recognise the pattern of cross-selling and upselling but, with other offices in the US, Canada, Japan, London and Hawick, Lochcarron was having problems keeping track of just who was attempting to cross-sell what to whom. "We found that our different offices were all potentially dealing with the same customers, but

offering different products and with no centralised record of who was speaking with whom," explains Chris Turner, Lochcarron's IT manager. "We needed a way for everyone on every site to see a customer's history while sharing that information with each other." So the company was looking for a customer relationship management (CRM) solution integrated with a messaging system.

"By several offices targeting the same people at once, Lochcarron was wasting effort. It needed much clearer 'ownership' of accounts to ensure everyone had the latest details on existing customers or prospects", says Paul Mason of solutions provider Kelros.

## A cultural shift

The potential for combined CRM and messaging by means of Kelros's proven workflow systems integrated with the Lotus Notes mail platform meant Lochcarron opted to go for an entirely new email set up, based around Notes. This didn't just mean migrating from its existing email system, it also meant a major cultural shift.

"Previously, there had been no central repository for information on customers and prospects," recalls Mason, "so a lot of the information resided in the heads of the sales team. This made it hard to share with others in the same office, let alone across the Atlantic. Our workflow system, in conjunction with Notes, provides the benefit of server-to-server replication, meaning the same data is shared internationally throughout the company. The CRM system in the UK can replicate the server application in the US on an hourly basis. This means local information in the US or UK can be synchronised throughout the day, with every employee benefiting from the

same visibility with regard to client contacts, whether they are based in the office or out in the field."

For Chris Turner, this has not only welded together previously disjointed data flow, it also guaranteed it against accidental loss. "If a server goes down, another one picks up where it left off with the same workload and the same information," he explains.

## Marching in step

Blending CRM and messaging into one has also proved a winner. "The combined CRM application is perfect for us because it means all correspondence with the customer is available to see at any time," says Turner. "If there is a problem with a staff member, we can have someone else step in, see what the status is and take it from there."

That, in turn, means that if a customer contacts the company about a piece of tartan, the knitwear division simultaneously makes that contact, as does the accessories division, and they can plan their next step in synch to encourage further purchases.

All of which means that the offices of the world's premier tartan company are finally marching in step.

### YOUR NEXT STEPS



Find out how a CRM system can boost the efficiency, profitability and professionalism of your company's sales team

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