

Smart

IT

**GREAT
ANNUAL SAVINGS
GROUP**

Great Annual Savings

Cost reduction consultancy improves productivity and discovers a new way of working

When north-east cost reduction consultancy, Great Annual Savings (GAS) was seeking a more efficient way of working, they initially turned to SAP. Yet a troublesome implementation left them back on the spreadsheets until a better solution could be found.

Here's how Smart IT not only provided GAS with the perfect energy system for its brokerage service, but also helped them discover new, more efficient ways of working to boost productivity across the entire business

The Challenge

Cost reduction consultancy, GAS wanted to take their business to the next level. They knew there

were business systems out there that might be able to help them, and after some research they opted for a SAP implementation.

Unfortunately, for various reasons, this did not go well. So, the partner moved on-site to try to help the team understand the processes (as well as be in a better position to develop changes), but even this wasn't enough to save the implementation—and GAS eventually abandoned SAP and returned to using spreadsheets.

Understandably cautious after this experience, they knew that successfully finding and implementing the right ERP would take a partner who had an exceptional understanding of their business, its challenges and growth ambitions. They needed a system which could be designed to handle the energy industry standard data, as well as being set up to aid the closing of sales after the lead was won.

“With this project, we haven't only gained an efficient system, but a whole new way of working.”

Craig Shields, Head of Compliance



The system also needed to manage contracts and ensure that those signed for a future date would indeed go live on that start date, while objections could be checked, and terminations placed prior to a renewal.

Any new system needed to handle all of this. The supporting partner would also need to know enough about the industry to manage the implementation process in such a way that it would be successful with minimal drop in service.

How Smart IT solved these issues (and more)

After speaking with a number of vendors, GAS chose Smart IT. Why? Because we already spoke their language and had a demonstrable track record in delivering similar projects to the energy consultancy and broker industries. We understood about letters of authority (LOAs), meters, charge lines, etc, and we made sure we kept our finger on the pulse of the evolving energy industry. This helped us cement a firm partnership with GAS based on shared understandings, which went a long way to making sure the implementation would work.

Of course, we also needed the right solution for the job. Using our bespoke energy system, Smart Energy Broker which is built on the Odoo platform v11, we were able to deliver an off the shelf solution for GAS, with appealing features such as the handling of:

- LOAs;
- objections;
- terminations;
- telesales pipeline handling; and
- ownership/visibility of data.

In other words, this was an end-to-end business system, able to manage a large database of thousands of leads and prospects, as well as an assigned relationship with the energy analyst (or 'closer') who would be the one to guide prospects into contracts.

As good as any system is, however, successful implementation into a business always depends on the people. In this case, Smart IT made sure that the team at GAS were completely bought into the solution, while this team went out of their way to invest time, space and energy into training superusers on the system. These superusers would then roll out the system to each team week by week.

By incorporating significant training up front, and allowing for a longer rollout, questions were able to be raised in training and then resolved well before the system went live. Taking the pressure off both Smart IT and the client and making the whole process significantly easier to manage.



Results

Because Smart IT understood the industry and its challenges so well, the system ended up meeting about 95% of the client's immediate requirements. Plus, it was our smoothest implementation yet, which was especially good for GAS given their previous difficulties with SAP.

Investment in training and the rolling out of the system over a few weeks certainly helped. But a thorough demonstration of the system early on and our complete understanding of the industry and challenges were also essential to helping provide GAS with a hassle-free implementation and the confidence that this was the system they needed.

In fact, it's working so well now that the client even changed some processes to match the functionality of the new system, since it was more logical and efficient, and in line with best practice.

Smart IT has introduced Great Annual Savings to a whole new way of working with the Odoo platform with management embracing the system as its ERP to integrate all its back-office systems. Furthermore, the field sales, HR and time and attendance modules all currently being installed with further modules under consideration.

Key benefits

- Improved staff productivity by 20+%
- Real-time visibility across sales, contracts & procurement.
- Role-based profiles give personnel flexibility
- Reduced cycle time
- Scalability and integration savings
- SaaS moves from Capex to Opex model
- Significantly improved standardisations in their working practices and process flows.

“*The solution has been embraced by employees right across the business. Management acknowledges the Odoo platform has the scalability and flexibility to grow with the company's ambition. As such we've already implemented the field sales module and are currently installing the HR and time and attendance modules to help us run the business more efficiently in an integrated fashion.*

Craig Shields, Head of Compliance