

*"The benefits are beyond belief – we can work and monitor customers from anywhere in the world. Oscar is very small business friendly"*  
Mike Foster - MD CE Marking Association



## Background

Since 1989, the CE Marking Association based in Wootton Wawen has provided independent help and advice regarding affixing the CE mark and related product compliance Legislation; delivers training and workshops to increase in-house knowledge and ability; provides compliance and consultancy services such as EMC testing, electrical safety testing and machinery assessments; and provides clients with on-going support through access to its technical helpline and through membership of the Association. The letters 'CE' are the abbreviation of the French phrase 'Conformité Européene' which literally means "European Conformity."

The CE Marking Association with a turnover of around £660k has over 300 members including many large and small organisations. It is supported by many industry experts, enforcement agencies and business institutes.



## Challenge

4 years ago we wanted to grow our business. We believed nurturing our client relationships was key to achieving this and so started looking for a CRM (Contact Relationship Management) system to help us.

## Solution

After researching the marketplace, we found OscarOnline® (Oscar) that met our needs being a system specifically designed for SMEs i.e. it does all we need to do in a simple way without the complication of a full blown CRM systems. Like many SMEs our staff each carry out many tasks and want everything in one place which they get with Oscar. We also found the team supporting Oscar to be helpful and friendly.

We started with CRM then extended our use of Oscar to manage our training courses and later to manage our CE Association membership.

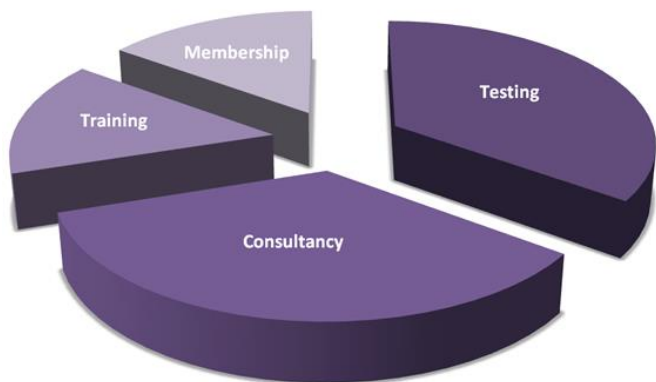
When we started with Oscar we had 20,000 contacts in a spreadsheet which we cleaned up to provide us with an initial 2,500 contacts. This has now grown to around 4,000 contacts with 500-600 coming back every year for repeat business.

People who find our web site can ask a question. Their contact details and their areas of interest are automatically captured in Oscar and placed in a holding area for assessment. Each contact is then emailed a reply which is also copied into Oscar to be stored against their contact information to create a communication log. 88% of the questions don't go any further but 12% take up services with us. To many we suggest they take our membership to be kept informed of the latest developments in the area of CE marking. The majority of our new clients come from this approach.



“Oscar has helped raise the bar of our professional interaction with our contacts and clients.”

Mike Foster - MD CE Marking Association



CE Marking Association Revenue Breakdown

The CE Marking Association members receive many benefits including regular informative newsletters, access to a helpline, an annual seminar and discounts on training courses. One month before membership expires each member receives a communication from Oscar. They are then reminded two weeks later. Any members who are one month late renewing are informed by Oscar of their lapsed membership.

Members can commit online to a subscription renewal. Oscar then issues an invoice, which is stored in the invoice ledger and noted against the contact. Our Bookkeeper checks the bank statement every day and marks up invoices that have been paid which show up against the particular contact in Oscar.

Oscar markets to all contacts but any specific communication only goes to those contacts whose interest stored within Oscar matches the communication. This allows us to be very focused in our contact communications with the aim of not sending out emails that are irrelevant to particular clients.

Our training is aimed at helping our clients develop in-house skills. The schedule of public class room courses is stored within Oscar. People sign up for a course on our web site and their details are automatically loaded into a holding area in Oscar where they are reviewed before being booked onto a particular course.

Oscar holds a library of standard documents and communication templates that are automatically sent out based on a schedule held within Oscar. This is a big benefit for us as a predetermined number of days before the course is held, delegates are automatically sent an information pack / joining instructions. Oscar also automatically adds tasks at the right time to specified staff's task lists before and after each course so that nothing is forgotten.

Oscar generates our quotes for training, testing and consultancy. We email our Oscar generated quotes adding any particular information in an email. The contents of the email is then cut and pasted into Oscar so that any member of staff can see what has been proposed to any particular contact.

When we receive an order, we convert the quote to an order and Oscar issues an order acknowledgement based on our T's and C's which gives our T's and C's legal precedent over the ones on which the order was placed.

Oscar can show quotes, orders and revenue against clients or generate reports filtered by interest type.

We now have seven people using Oscar at any time plus externally by our Bookkeeper and Accountant.

## Benefits

Oscar has been like a very efficient member of staff that never forgets a task, is never on holiday and is never ill.

Since we introduced Oscar many clients have come back for the full range of our services. We have generated a lot more business from our contact database that we could have done without Oscar.

Oscar eliminates clients becoming frustrated as any member of staff they contact is able to see what is happening with that particular client.

Everything is in one place. We don't need any more to enter the same data into multiple systems connected together with some form of system integration which significantly simplifies our IT solution and data entry.

If Oscar was not there we would need more staff to get the same amount of work done.

