

## Case Study: Alchemy Agencies

Alchemy Agencies is the leading supplier of specialty chemical and processed fruit and vegetable ingredients into New Zealand and distributor for Australia.

**Headquarters:** Auckland, New Zealand

**Customers:** Over 1000

**Founded:** 1995

**Staff:** 16

**Website:** [www.alchemyagencies.co.nz](http://www.alchemyagencies.co.nz)

**Partner:** CloudTech



### Challenges

To gain thorough visibility of supply roadblocks, New Zealand importer and distributor Alchemy Agencies had to move to a more modern Customer Relationship Management platform. Having used a MS Access solution for over 3 years Alchemy Agencies felt it was time to make the move to a proper CRM System. Increasing staff numbers also meant a scalable system that was hosted offsite had become important and access to the CRM for reps on the road was also a critical requirement.

### Solution

Following an evaluation of the major CRM software systems on the market, SugarCRM was the best fit for Alchemy Agencies. Initially a standard version of SugarCRM was considered, but Alchemy Agencies opted for a CloudTech AWS Hosted Solution.

### Benefits

SugarCRM system has provided a significant improvement in the undisputed quality and accuracy of information the company can pass onto customers and suppliers. It has also helped Alchemy Agencies to quickly identify roadblocks at both the suppliers' or customers' end, and put in place strategies to effectively troubleshoot any issues.

**How i CRM: Alchemy Agencies  
SugarCRM helps Alchemy Agencies overcome  
communication roadblocks**

### Introduction

With a start-up staff count of around eight, Alchemy Agencies put in place an in-house built system based on Microsoft Access around three years ago. However, to gain thorough visibility of supply roadblocks, New Zealand importer and distributor Alchemy Agencies had to move to a more modern Customer Relationship Management platform.

"It started out just as an individual tool, a tool for myself to manage my customers and projects," Alchemy Agencies Director Nick Bray says. "Then it expanded from there, we bolted on more functionality and some of the other team members started to use it as well."

It was at this point that problems started to arise. Bray realised that the system was not scalable and employees had to be in the office to use it, which was not very convenient considering most of them are out of the office all day in customer meetings. For what Alchemy Agencies was getting, the system was expensive.

"So that's when we decided we needed to go to a different platform", says Bray.

### Building a base for expansion

With 14 warehouses operating across Australia and New Zealand and offices in Auckland and Sydney, Alchemy Agencies needed a more modern platform to capture information about customers, suppliers and projects.

Bray says when they started investigating a new CRM system, they had around 1000 customers, 700 projects running in the Access database and eight staff on board.

CloudTech were able to define a set of business requirements for Phase 1 aimed at replication of the functionality that existed within the MS Access Database, with a Phase 2 aimed at integration between SugarCRM and MS Navision (the existing financial system)

Following an evaluation of CRM software systems on the market, Bray says SugarCRM worked out to be the best fit.

"There were other more cost effective systems in the market place but many of these systems had poor reporting, workflow and customisation capabilities. SugarCRM was a good fit both in terms of price and key functions required".

### Hosting – the road to success

Initially he had looked into a standard version of SugarCRM, but opted for a hosted system.

"We looked at some customisation and it became reasonably clear that we would go to a hosted system, hosted by a third party where we would be guaranteed better uptime and speed and would find it easier to make the required code level changes."

Alchemy Agencies requires a lot of complex modules and reporting solutions as the business essentially has two sets of customers – end users and suppliers, who require different things. The ability to generate various custom reports was therefore essential.

Alchemy Agencies deployed the SugarCRM system in February 2014 with minimal issues.

“It was mainly just the case of flooding our existing databases into the SugarCRM structure.”

### Personalising the look

One of the main benefits Alchemy Agencies experienced since the implementation of SugarCRM system is a significant improvement in the undisputed quality and accuracy of information the company can pass onto customers and suppliers.

“SugarCRM has been the tool Alchemy Agencies needed all along. The communication with suppliers and customers is now streamlined and efficient, which saves the team a lot of time and significantly reduces errors.”

The SugarCRM platform has also helped Alchemy Agencies to quickly identify roadblocks at both the suppliers’ or customers’ end, and put in place strategies to effectively troubleshoot any issues.

Due to the intuitive nature of the SugarCRM system, Alchemy Agencies staff are finding it straightforward to reap the benefits of the new system.

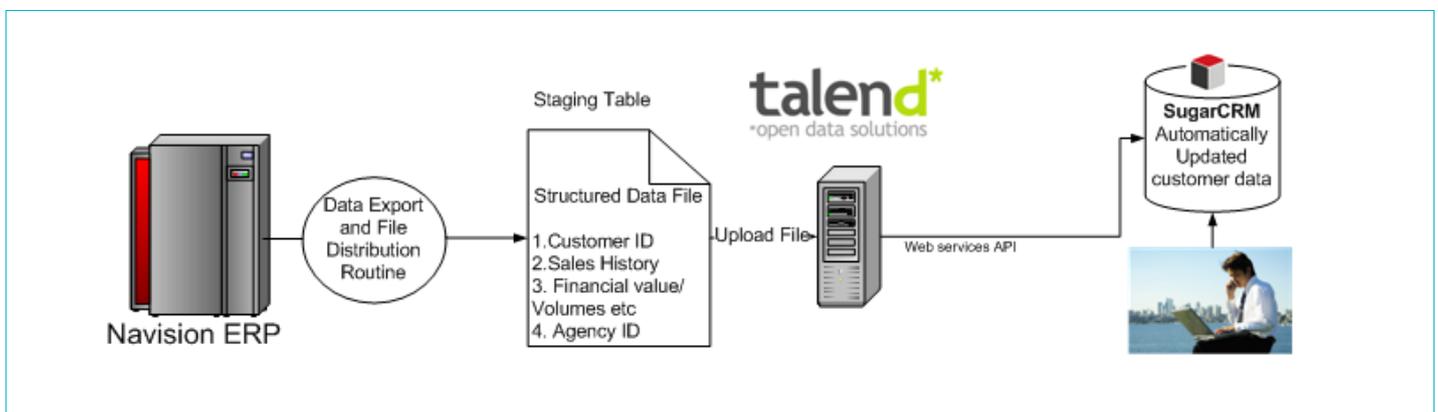
“We have regular training to ensure staff are using the system to its full potential. We keep on getting amazed by all the capabilities of the SugarCRM system. There aren't many issues pertaining to customers, support and sales that SugarCRM can't fix,” Bray says.

### Next steps

A custom integration with the existing Financial System and the creation of customised dashlets are now being delivered by CloudTech. This will provide more valuable information for the customer facing staff and will include a daily load of agency and customer records and all relevant sales data taken from the existing Microsoft Navision ERP System into SugarCRM:

The integration is being completed using the Talend Open Source Integration Tool. (<https://www.talend.com/>).

See Below for Data Flow Diagram:



### Pullouts

“We want to keep it pretty simple at the start. We will just roll out an extra feature every couple of months so staff have time to master every new feature they get trained on, and this also keeps the momentum going” Alchemy Agencies Director Nick Bray says.

“CloudTech have been an excellent partner both in terms of the initial deployment of SugarCRM and the ongoing development” Alchemy Agencies Director Nick Bray says. “They have a good mix of business acumen and technical capability, including local development resources”

## Customisations and Integrations

### Integrations

Integration between SugarCRM and Navision (built using Talend)

### Customisations

Custom PDF Template for Alchemy Reports (Built in PHP)

### Solution partner: CloudTech

Alchemy Agency’s customised Sugar deployment has been developed, implemented and managed by CloudTech. CloudTech is the largest SugarCRM solutions provider in New Zealand with over 80 customers.

CloudTech is firmly focussed on producing good business outcomes for its customers through the clever application of SugarCRM.



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