

# ProspectSoft CRM Case Study

## Metalock Engineering UK Ltd

### Business

Metalock Engineering UK Ltd, based in Coventry, is an established global mechanical equipment repair company. The company was established in the UK in 1947 and in the years that have followed they have built up an outstanding reputation for quality work delivered on time and within budget.

Metalock UK provides a range of specialist engineering services to a diverse range of engineering industries all around the world, which include Power Generation, Marine, Petro Chemical, Steel, Paper, Pressing & Forging, Mining and Offshore.

### Challenge

The main reasons for choosing the ProspectSoft CRM system were:

- To respond quickly to customer queries
- To automate the sales process, maximising conversion and sales staff effectiveness
- To eliminate the time-consuming manual quotation process

### Solution

Metalock were initially evaluating several CRM systems, of which many did not match their specific overall requirements. Bridge 360 LLP, one of the Gold Partners of ProspectSoft, recommended ProspectSoft CRM due to its overall functionalities that would satisfy Metalock's key objectives.

### Results

Since implementing ProspectSoft CRM in 2007, Metalock has greatly enhanced their business management:

- All ProspectSoft CRM users can now respond quickly to customer queries due to instant access to customer information.
- Customer quotations can now be generated in minutes rather than hours.
- Integration with Microsoft Office ensures elimination of re-keying errors.
- Metalock's complex sales process is now easily and quickly managed.
- ProspectSoft CRM users can access all Opera sales ledger transactions.

A further four mobile users can also access critical customer data at any instance. These functionalities give all mobile users the ability to process and confirm orders. 'Out of Box' accounts integration with Opera effectively links back office processes, providing an end to end solution to enhance business growth.

### Quick Overview



"It is evident to us that ProspectSoft CRM is saving us a lot of time when it comes to quoting. It also has streamlined our operation past this point, right up to invoicing"

**Martyn Green**, Managing Director of Metalock Engineering UK Ltd

### CRM System Details

No of sites: 1

No of network users: 20

No of mobile users: 4

No of modules: 13

**Number of Employees - 58**

**CRM solution – ProspectSoft CRM**

**Accounting System – Pegasus Opera II**



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