

# Case Study

Interim Management



## < Coidan Graphite Products Ltd



**Coidan Graphite Products specialises in the manufacture of Graphite products for industries as diverse as Chemicals, Nuclear, Automotive, Aerospace and Renewable Energy industries. The company manufactures products, small and large in a 10000sq.ft workshop equipped with state of the art CNC machinery.**

### The Challenge

Coidan Graphite Products Ltd operate worldwide and have built up an enviable reputation for the quality manufacture of graphite products across a number of diverse industries. During that time Coidan Graphite has developed strong relationships with numerous suppliers and end users, and as the business has grown the effective management of time and communications with clients has become more challenging. Contact details were kept in Excel spreadsheets and "black books" and the CEO decided that it was time to improve his business marketing, and increase his client retention and management.

### The Solution

Knowledge Processes Ltd was requested to undertake a review of the existing front end business processes and data and then determine if a better approach to

CRM could be developed, within a tight budget. It was essential that the new system could be implemented without loss of productive time and that the system was intuitive for the operators. New company specific fields were identified and engineered into the solution, and the contact data held in the original spreadsheets was imported directly into the new system, saving considerable downtime and additional costs.

### The Benefits

Knowledge Processes Ltd recommended and provided a Sage Act Premium software implementation. The Act system was configured to provide a simple interface with all the information which had previously been located in the various spreadsheets and other bespoke system. When the design layouts had been agreed and approved by the Coidan Management, existing customer information data and typical client correspondence templates were imported, to enable a fast handover and utilisation of the new Sage Act CRM system.

Operator training was provided to staff which enabled them to quickly make effective use of the new system, and undertake any of the many functions such as Calendar management, group and list management together with mail merges. In fact once contacts had been identified with specific product fields and dynamically assigned to groups (a useful exercise for the business) an email merge to invite relevant clients to an international exhibition was completed during the training session by the team.

The system is now the backbone for client records and pro-active marketing activity for the various departments within Coidan Graphite Products, improving the capability to compete in a very competitive environment. The uptake of the system proved so effective that another business within the group Kirk minster Engineering Ltd has already started development of its client database.

**Knowledge Processes Ltd**

The Cottage • 44 Main Street • Riccall • York • YO19 6QA • M: 07834 541591 • T: 01904 898134  
E: [lf@knowledgeprocesses.com](mailto:lf@knowledgeprocesses.com) • W: [www.knowledgeprocesses.com](http://www.knowledgeprocesses.com)

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In a recent marketing exercise a mail shot was sent to the targeted clients, by making use of the advanced query tools and by generating recipient specific letters. Mr. David Coidan – Group Chief Executive Officer, said that “We are now fully committed to the benefits being delivered from the ACT CRM system; We now have an excellent means to communicate with our clients, and we have developed our internal business systems to make use of the scheduling and calendar functions within Act allowing us to plan our business much more effectively.”

One unforeseen and welcome result from the CRM implementation according to Clare Coidan – Director, was that “The implementation gave a focus for reviewing our client related operating procedures, and as a result new processes and procedures have been developed and are now proving so successful that new ways of working have been introduced. It is hard to see how this would have been achieved without the CRM project”.

Another unexpected result was the realisation that many of the data records could overlap and replace other existing records which helped us achieve the accreditation to ISO 9001:2008 with ease.

### Customer Testimonial

“Working with KPL, and closely with Leigh Foster throughout the design and implementation has been a positive and valuable learning experience for us. Throughout the process Leigh has identified new ways to streamline the way we do things, and supported our ideas with the development of unique fields within Act that support our business. The workshops we held were a real benefit to us and the bespoke training Leigh delivered ensured that our new system

was operational and making a difference very rapidly. Leigh has always acted in a professional and positive manner; he has demonstrated the benefits of working with a professional business to reach a good and sustainable solution which can be developed to the benefit of our business.”

Mr. David Coidan  
Group Chief Executive – Coidan Graphite  
Products Ltd