



Equation Technologies Fulfills Optelec's Technology Vision with Sage 300

Customer Optelec

Industry Healthcare

Challenge

An acquisition and location consolidation led to more diversification and product offerings, increasing complexities.

Solution

Equation Technologies migrated Optelec to Sage 300 which allowed them to serve 40% more customers without the addition of more staff.

Results

- Accounts receivable turnover and cash flow improved by 32%
- Ecommerce site allows for more dollars to be spent on marketing than order taking
- Availability and ability to purchase products by web visitors

Equation Technologies helped Optelec create new sales channels with an ecommerce site and Sage CRM implementation while improving and automating internal processes. "Improving the quality of life of visually impaired and dyslexic people - reaching out with simple and effective solutions" is the stated mission of Optelec, a subsidiary of The Netherlands-based Tieman Group. For more than 30 years, Optelec has supplied customers around the globe with innovative products. The U.S.-based subsidiary was founded in the mid-80s by former Polaroid researchers who wanted to help improve the lives of the visually impaired. The Tieman Group purchased Optelec in 1997 and today is considered the worldwide leader in this specialized market. With customers spanning eye care professionals, product distributors, institutions, governments and not for profits, Optelec has a diverse distribution channel representing a wide breadth of products including Braille, electronic low vision, correctional and daily living products.

While not wanting to rest on their laurels, Optelec continued to search for more distribution channels. Takashi Yamashita joined Optelec in 2005 to prepare for the purchase of Lighthouse International's Professional Products Division. The acquisition would further Optelec's diversification and product offerings. With the acquisition complete, the next step for Takashi was to consolidate the two locations; Lighthouse was based in California and Optelec in Massachusetts. "The Sage 300 solution had been selected and purchased when I arrived," said Takashi. Optelec spent the first two months of 2006 pulling data into the new Sage 300 system and restructuring the chart of accounts.

Expertise & Support Clear Path for Progress

After the physical office move to California had been completed, it made sense to find a local firm to provide the expertise and support that Optelec required. Additionally there would be two big projects coming up - an ecommerce site integrated with Sage 300 and an implementation of a customer relationship management (CRM) solution. Optelec also needed help with data cleansing and creating more meaningful reports.

Now as CEO, Takashi met with three firms and interviewed their customers. He selected Equation Technologies to work with. "I felt that I



had the most honest, real dialogue with them,” said Takashi. “They spent a lot of time assessing and understanding our needs before bringing a solution to the table. This brought a lot of trust and credibility to the relationship.”

New eCommerce Site

The objective for the eCommerce site was to create an alternate point of entry for consumers and eye care professionals. “Now there is on-line access to the complete range of products and product information,” said Takashi. “We have been able to create pricing and availability rules based on user information.” For example, a consumer could view all the products available, but may not be able to purchase something because it requires a prescription; however, Optelec wanted the consumer to be aware of the product and talk to their eye care professional about it. Also for the consumer, retail prices, instead of distributor prices, would appear. Optelec is able to manage varying prices based on a purchaser’s sales volume through the rules matrix.

Equation Technologies served as the lead during the eCommerce project. “I tend to get nervous when there are so many different companies involved in a project,” said Takashi. The eCommerce project involved internal staff, website consultants, Iciniti for credit card processing and Avalara’s AvaTax product for calculating taxes by ZIP code. “Equation Technologies held all these players accountable for their piece,” said Takashi. “They were a critical part of the team and in the end I got exactly what I asked for.” With all the varying pieces involved in the project, the fact that Equation Technologies took the time up front to understand all of Optelec’s goals and objectives

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Optelec, CEO



With an eCommerce site in place, Optelec has been able to serve 40% more customers than before, which has translated into increased revenues. “Before, we had no way of reaching the consumer, now we do. For the eye care professionals, the time spent on order entry is significantly reduced because most ordering is done on line instead of involving our staff,” said Takashi. “We also have been able to give access to account information to customers. They can look up account balances, print statements, track shipments and make payments on line. This also reduces the amount of time our staff spends fulfilling these types of customer requests. Our accounts receivable turnover has increased 32%, which has a dramatic effect on cash flow and our web lead generation has doubled.”

Consolidate Data & Improve Productivity

Another result of bringing two companies together was that customer information was housed in various databases, including Access and Excel; data was scattered and fractured; and the number of resellers expanded significantly. Optelec needed to consolidate the islands of data into one system, manage both the current account relationships and the activities associated with prospective accounts; and improve the productivity and reporting of the sales department. Equation Technologies recommended Sage CRM and together with Optelec began the implementation. “Now, when a lead comes in from our website, the information is automatically populated into Sage CRM and a task is created for follow up,” said Takashi. “Our sales team is more productive because everything is in one place. The level of intelligence that can be streamlined to our inside sales reps with real-time data has increased their effectiveness.”

“The advantage of working with Equation Technologies is that they have a strong desire to understand the needs of their customers. It is genuine. I don’t feel like I am being sold anything, but they are recommending a solution to help Optelec be more successful,” said Takashi. “They also have a good process of framing projects and budgets. Whenever a consultant comes to our office, they have a work order with them so there are no surprises when the bill arrives. The services that Equation Technologies provides are value based and their practices are consistent with that. I view them as a partner.”



United States 533 2nd Street | Encinitas, CA 92024

Canada 220 Brew Street, Suite 301 | Port Moody BC V3H 0H6

866.436.3530 | info@equationtech.us