

**RAM Universal improves  
visibility, accountability,  
and team collaboration with  
SuperOffice CRM and  
Synergy Technology**



# Introduction

**RAM Universal Ltd** has been supplying high-quality and bespoke valve and control solutions throughout Europe since 1982. The company provides all types of valves to the process industry and can design and manufacture one-off solutions to meet specific requirements. They operate across a range of industries, including chemicals, pharmaceuticals, and clean energy.

The team at RAM pride themselves on their technical knowledge, which they have built up over more than 40 years since the company's inception and they are confident they supply a valve or control solution to fit almost any process condition.



# The Challenge

Prior to implementing SuperOffice CRM, RAM Universal faced several key challenges:

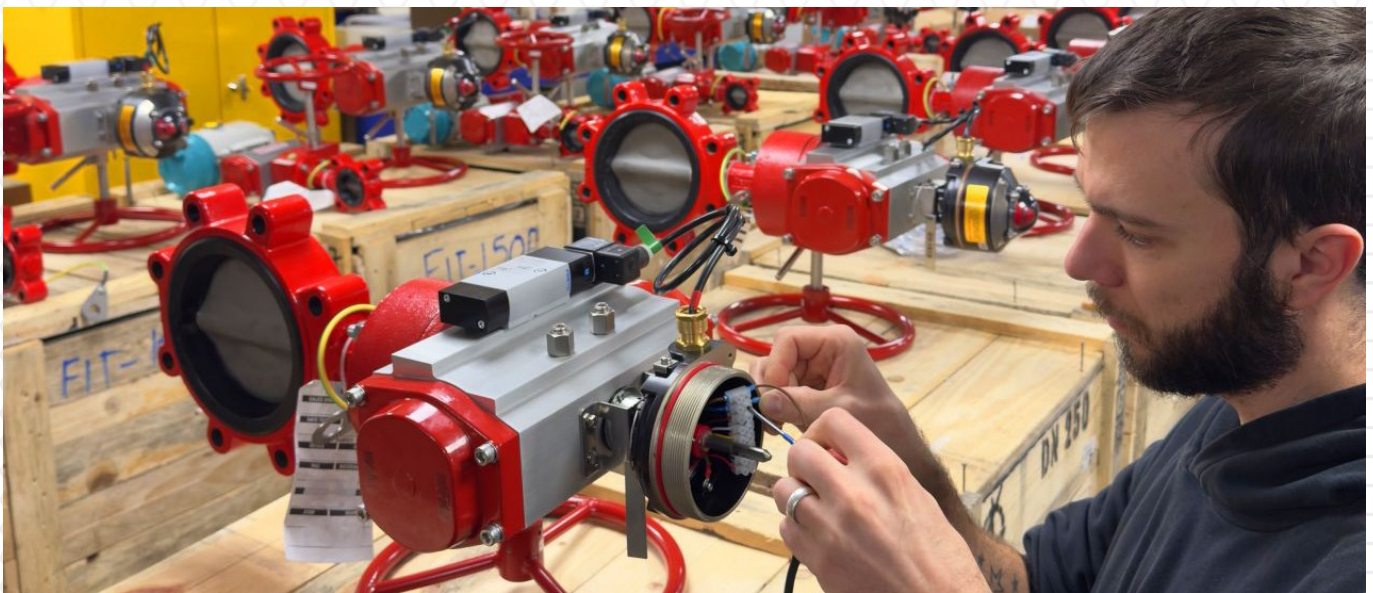
- **Limited visibility and lead management** practices resulted in missed opportunities. Without a clear, structured system to track and manage incoming enquiries, valuable leads were at risk of being overlooked. This made it difficult for management to monitor follow-up actions and ensure key opportunities were being progressed.
- **Disconnected communication channels** contributed to missed or delayed responses. Enquiries came in through various sources, website forms, emails, and phone calls, but often ended up scattered across individual inboxes or overlooked in a shared mailbox. The absence of a consistent process meant no clear ownership and reduced accountability.
- **Conventional enquiry management** led to reliance on senior staff, resulting in bottlenecks and limited team growth. High-value or complex enquiries were typically handled by a few experienced individuals, which restricted knowledge sharing and prevented broader team development.
- **Challenges in accessing actionable data** limited insight-driven decision making. The current ERP system made it difficult to extract timely, meaningful information. As a result, the team struggled to analyse sales performance or spot trends, hindering efforts to optimise quoting, inventory, and pricing strategies.



Recognising these issues, RAM Universal sought a CRM system to centralise and track all enquiries, ensure accountability, and improve collaboration across the sales team. “We've had a big problem with visibility. Once an enquiry comes in via our website, phone or email, they would go into individuals’ inboxes, and we were finding that things were getting lost, and information was going awry,” explains Charlotte James, Operations Manager at RAM Universal.

The tipping point came when Charlotte discovered a missed quotation for a long-standing prospective customer purely by chance. Although the quote was for a relatively low-value item, it was for a client the company had been keen to build a relationship with.

This incident highlighted a broader issue: without a centralised system, management lacked the visibility needed to ensure that important leads were being followed up and handled appropriately. This realisation prompted RAM Universal to seek a CRM solution that would centralise all enquiries, improve collaboration across the sales team, and ensure accountability, laying the foundation for a more responsive and effective sales process.



# The Solution: SuperOffice CRM

RAM Universal's introduction to SuperOffice came by chance, during a supplier review meeting with one of their Nordic-based partners. As part of the visit, the supplier shared a glimpse of their own CRM dashboard, which immediately caught the attention of Charlotte.

"They came to visit for a supplier review meeting, and they were showing me this lovely dashboard. I said, oh my goodness, that looks amazing, I want one of those."

At the time, Charlotte had already been exploring CRM options to help improve visibility and control over the company's sales enquiries and customer relationships. She had considered a range of systems, including Microsoft Dynamics and some simpler alternatives, but none had quite matched what she was looking for.

"We'd looked into Dynamics, and a few other, more simple ones, but I kept going back to the visuals that SuperOffice offered, along with the useability of the system. It felt very easy to use, but without being too basic, which I think some other CRM systems can fall into the trap of being, so I enquired with SuperOffice direct and they put me in touch with Synergy Technology."



One of the key attractions for Charlotte was the SuperOffice interface, which struck the right balance between functionality and ease of use. It was important that the system would be accessible for the whole team, including those less familiar with digital tools.

“The interface is very user friendly. We've all been surprised at how quickly it's become second nature – changes to systems and tech can be disruptive, but we've found it to be a very smooth transition.”

That initial spark of inspiration started RAM off on their CRM journey, towards better visibility, accountability, and team collaboration.

## Scoping and System Design

From the outset, Synergy Technology took a highly collaborative and responsive approach to designing a CRM solution tailored to RAM Universal's needs. Account Manager Matthew Lamb and CRM Solutions Architect Trevor Sharp worked closely with Charlotte and her team to ensure the system was shaped around their processes, rather than forcing them to adapt to the software.

“In terms of Synergy, they have honestly been a pleasure to work with. Matt from the beginning was so responsive, super helpful. I think he struck a really nice balance between telling me what was possible and allowing me to dream about what potentially could be.”



This thoughtful approach gave the RAM team the freedom to explore ideas without being constrained, and still benefitting from expert guidance. Charlotte valued how both Matthew and Trevor offered practical alternatives when certain ideas weren't feasible, turning challenges into workable solutions.

"I think what's so great about Synergy is they will think about your sometimes crazy suggestions and then think, 'ok, we maybe can't do it like that, but we could do it like this,' and they'll work with you on that. Trevor has gone above and beyond to help me. I'd have a brain wave and want to bounce the idea off somebody, and he would be there either on Teams or on the phone pretty much straight away."

This level of support and flexibility meant that the project was well-scoped, but also flexible, and able to respond to evolving needs and ideas as they emerged during the implementation process.

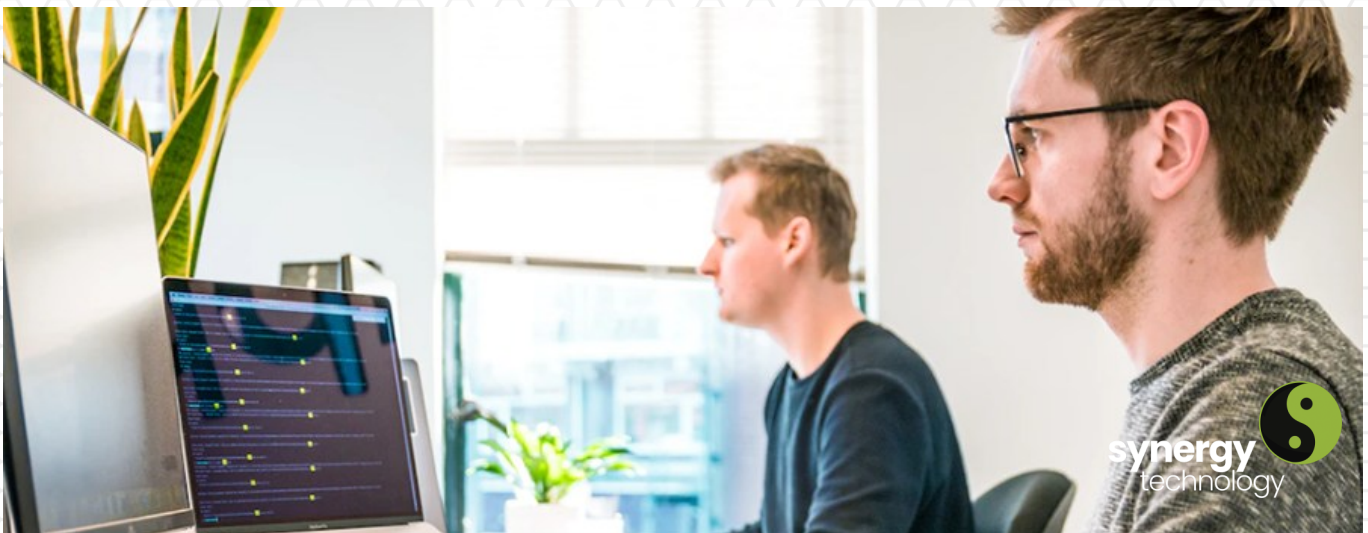
"I think the account management has been the best I've ever experienced with any sort of tech implementation" said Charlotte. The result was a system purpose-built for RAM Universal, designed with their team, their challenges, and their long-term goals in mind.



# Implementation and Rollout

Working closely with the team at Synergy Technology, RAM Universal successfully implemented SuperOffice CRM through a carefully planned and managed rollout including:

- **Tailored Training:** The initial implementation meeting focused on simplifying the system for users of all experience levels, with clear explanations of its purpose and benefits.
- **Building Buy-In:** Emphasis was placed on showing how the software would make users' jobs easier, helping to secure early team engagement.
- **Proactive Support:** Throughout the rollout, the support team remained responsive and committed to resolving problems swiftly.
- **Smooth Transition:** With strong support and ongoing communication, early challenges were addressed, ensuring a successful rollout, while maintaining stakeholder buy-in.



# Immediate Improvements in Productivity

With over 6 months since implementation, the team has experienced some immediate improvements in productivity that they were able to share:

- **Increased Quote Volume:** Improved visibility of incoming enquiries has led to a 38% increase in quotes generated compared to the previous year, demonstrating a clear uplift in sales activity enabled by improved tracking of incoming requests.
- **Faster Customer Response Times:** All customer information and enquiries centralised in one system has led to increased responsiveness to customer enquiries. The team can respond more quickly and efficiently, making it easier to prioritise and follow up on valuable leads.
- **Clearer KPIs and Accountability:** The new system has made it easier for management to set clear KPIs and track progress against them. This clarity has encouraged a more consistent and proactive approach to quoting, helping to drive overall productivity.
- **Stronger Team Collaboration:** Better collaboration and oversight allowing managers to support and guide team members more effectively, improving both individual and team performance. The centralised access to information also makes it easier for colleagues to step in and keep things moving when someone is out of the office or on holiday.
- **Ongoing Learning and Support:** Key customer insights are shared across the team rather than being siloed in individual inboxes. With senior team members sharing knowledge more effectively, this helps the sales team improve how they approach and respond to customer needs.



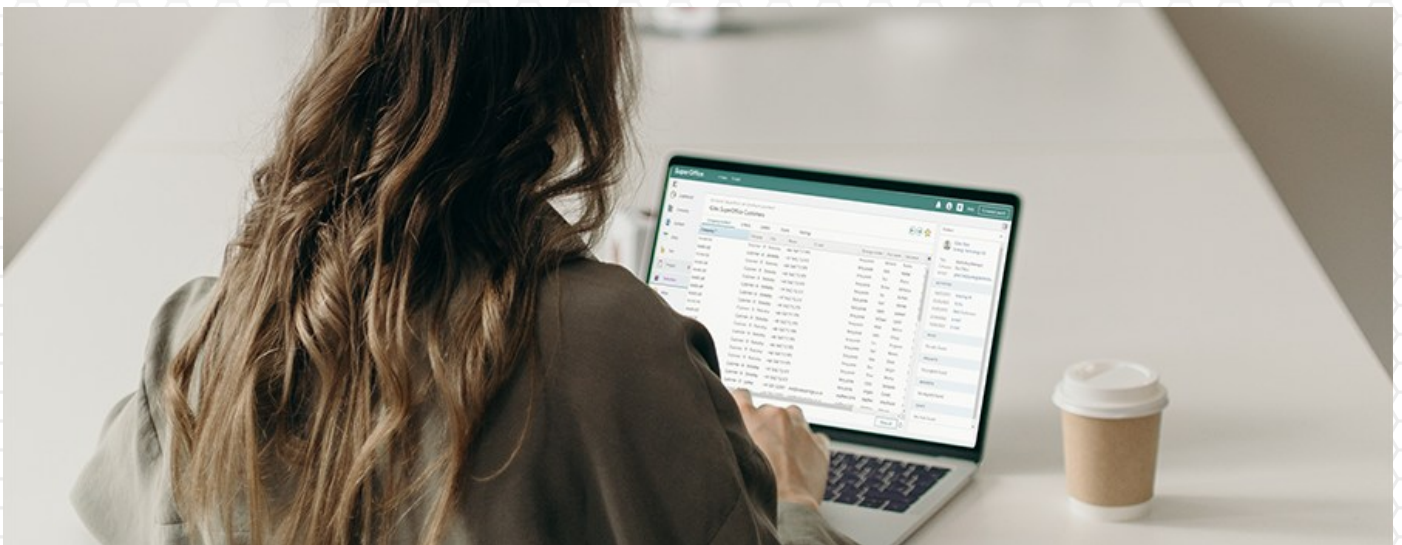
## The Future:

### A Scalable System with Room to Grow

While RAM Universal's initial CRM rollout focused on improving sales visibility and performance, the company is already looking ahead to expand the system's capabilities. Integrating SuperOffice CRM with their ERP system is one possibility under consideration for the future. However, as Charlotte explains, it was important not to overload the business with too much change at once.

"Integrating stock management, etc. at this point would have been far too much, but it's nice to know that we've adopted a system that can grow with us, and because of the way everything has gone there is appetite both from myself and from the rest of the team to do more."

A key factor in the success of the implementation was Synergy Technology's flexible, customer-led approach. Rather than pushing for a rapid rollout of all features, the Synergy team worked closely with RAM Universal to prioritise what mattered most and pace the project in a way that suited the team.



“What was really nice about it was that there was no hard sell of ‘you need to do this right away’ and ‘you really need to roll this all out as soon as we get going.’ Synergy were happy for us to take it at our own pace. There was a patience and an understanding that things take time and I think we really needed that.”

Charlotte also appreciated SuperOffice’s flexibility and Synergy’s ability to tailor the solution to fit their established workflows, a critical factor in ensuring team buy-in.

“What I love about SuperOffice and Synergy’s implementation of it is the fact that it’s such a buildable program. The stage-by-stage implementation meant that we could make changes at a pace that felt comfortable. We didn’t want to overload people with lots of changes at one time – it was important for the pace to suit everyone in the team.”

With the successful rollout now embedded in day-to-day operations, RAM Universal is well-positioned to continue enhancing the CRM system’s functionality at a pace that supports both its team and business goals.



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