sales-i
A SugarCRM Company

CASE STUDY

Lubricants Manufacturer Spots Missed Opportunities and Grows Revenue

Manufacturing

Manufacturing

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John Grierson
Sales Director

PENNINE LUBRICANTS

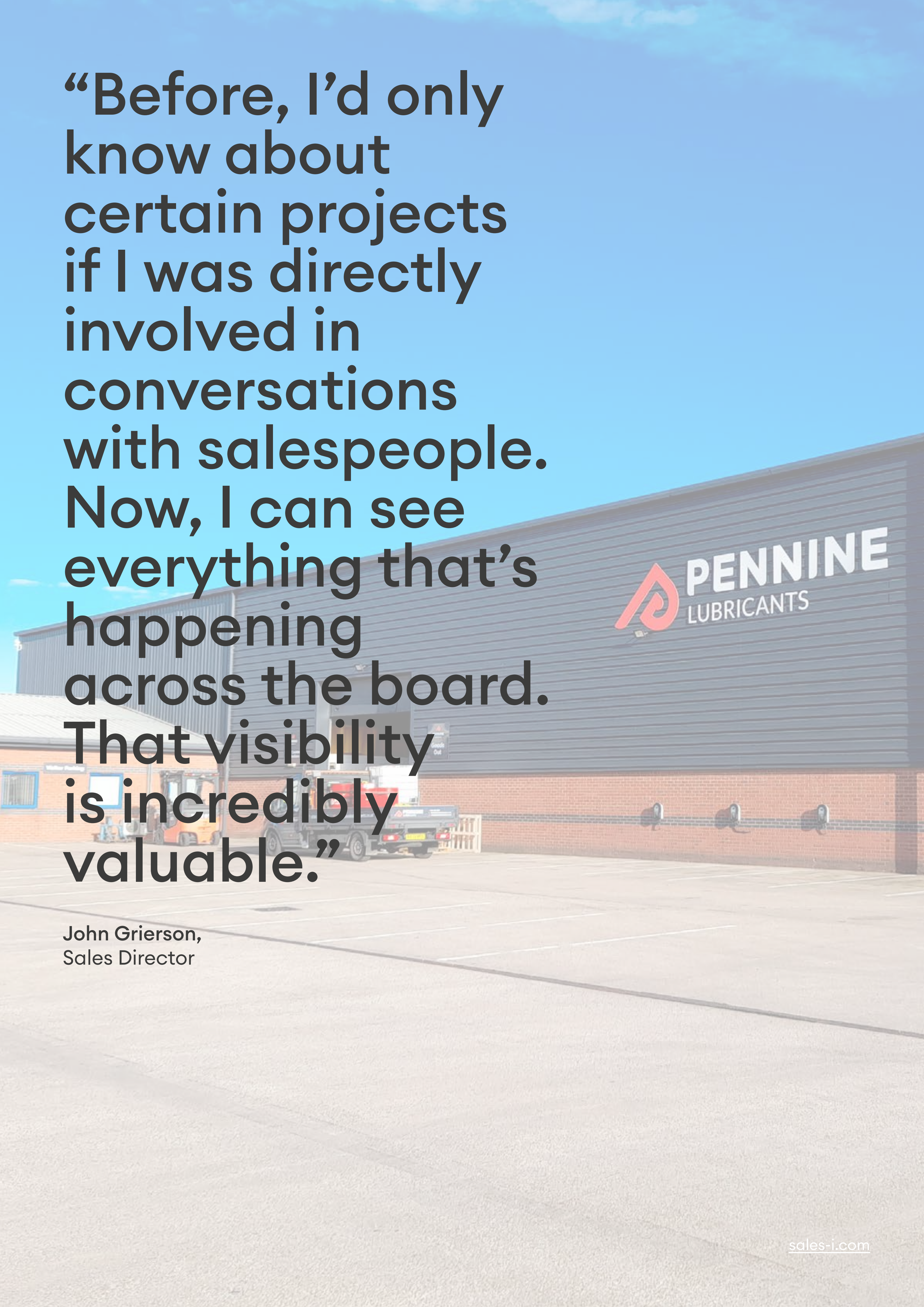
For over 30 years, Pennine Lubricants has been producing industrial oils and lubricants from its base in Sheffield, growing from a small, family-run operation into a manufacturer and supplier with a reach that spans Europe, Turkey, and Israel.

They work closely with each customer to tailor products and provide hands-on support, whether that's developing a custom lubricant for a specific application or running fluid management programs to keep operations running smoothly.

Keeping Up with Growth

But this growth brought challenges. With just four sales representatives managing over a thousand active customers, Pennine's sales team struggled to keep track of customer activity. "Everyone had their own system–personal notes, spreadsheets, whatever worked for them," says John Grierson, Sales Director at Pennine Lubricants. "This started causing issues, especially when accounts were reassigned or someone left the company."

Beyond losing continuity, the team also risked missing out on potential sales opportunities. "It's human nature to focus on the top 20% of customers–the ones you talk to all the time. Without a clear system, the rest can easily fall off the radar," Grierson adds.



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Searching for Ease of Use

The company tried analyzing sales data through its enterprise resource planning (ERP) software, SAP, but found it slow and clunky. “SAP is great for production, manufacturing, and accounting, but we needed something built for field sales,” says Grierson. They also tried Salesforce, but it couldn’t sync with their back-office system. “Plus, it felt too corporate and complicated for what we needed.”

To gain better sales insights, Pennine Lubricants chose sales-i by SugarCRM for its user-friendly interface. “Introducing new software can backfire if it’s too complex or time-consuming,” he says. “sales-i was the opposite–intuitive, straightforward, and easy to use. I knew our team wouldn’t be afraid of ‘breaking’ it.”

Advocating for Change

Built specifically for sales teams, sales-i connects seamlessly to ERPs and turns customer data into daily sales insights that representatives can act on. Pennine quickly integrated sales-i into its daily routines, encouraging the team to focus on capturing valuable insights rather than every minor detail. “We made it clear, it’s not about micromanaging,” says Grierson. “It’s about using our customer data more effectively to spot opportunities.”

sales-i representatives went to Pennine’s offices to train and support the team, making the rollout easier to manage. “The training was well-structured, delivered in manageable chunks, perfect for those who might feel overwhelmed by a new system,” says Grierson. “Whenever we had questions, we got quick, helpful responses. That personal touch from sales-i has been fantastic. You feel like you’re dealing with a team that genuinely cares and is invested in your success. It’s the kind of relationship we try to build with our customers.”

As part of the roll-out, Pennine also standardized its sales process, creating clear stages like prospecting, negotiating, and closing. “Now, when the team talks about a customer, everyone’s speaking the same language,” says Grierson.

Gaining Actionable Insights

Today, sales-i is fully integrated with Pennine’s ERP

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system, putting all customer data, notes, and documents right at the sales team’s fingertips. Before meeting with a customer, reps can pull up records on their tablets and review AI-powered reports for quick insights. The system also tracks performance metrics, like time spent on service visits, helping management make smarter staffing decisions.

With sales-i, Pennine’s team now has a complete view of each customer, from spending patterns to payment status. “It’s a quick snapshot of what’s happening–whether certain products have dropped off, spending has changed, or new contacts have been added,” says Grierson. “Before, I’d only known about certain projects if I was directly involved in conversations with salespeople. Now, I can see everything that’s happening across the board. That visibility is incredibly valuable.”

Analyzing Trends, Chasing Opportunities

sales-i also keeps historical interactions and key insights within easy reach. For example, when a customer’s competitor product failed, they switched to Pennine’s. Beyond closing the sale, the team logged crucial details–what the product was, why it failed, and how the customer responded. Now, anyone at Pennine can search for that competitor’s product, pull up those notes, and get instant context, even if they weren’t involved in the original incident.

With this 360-degree view of past and current trends, Pennine can now spot opportunities that might have gone unnoticed before. “We’re not just tracking what customers are buying, we’re pinpointing what they’re not buying,” says Grierson. “If a customer hasn’t ordered in a while or

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Executing More Seamlessly

Thanks to built-in reminders from sales-i, the team can keep leads from slipping through the cracks, making it easier to see each one through to the finish line. “Sales-i keeps everything front and center until it’s resolved–whether it’s a win, a loss, or something to revisit later,” says Grierson.

Pennine has also improved how it runs its sales campaigns. “sales-i helps us track how each interaction happened–whether it was by phone, email, or in person,” says Grierson. “Now we can see which methods worked best and gather insights from all sales reps in one place.” This way, the team applies what they learn to future campaigns, making each one more targeted and effective.

Getting Ready to Scale

With sales-i doing the heavy lifting, Pennine is better positioned to grow its customer base without getting overwhelmed. “Before, some team members felt stretched thin by the number of accounts they’re handling,” says Grierson. “Not anymore. sales-i lightens that mental load, making it easier to stay on top of a large client base without missing potential opportunities. We’re managing the current sales volume so effectively that expanding the team isn’t even on the radar.”

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Sell smart.

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