

# Transforming Business Operations with Sage Alerts and Workflow

Learn how Stewart Tech helps a manufacturer streamline business processes, enhance efficiency, and engage customers using Sage Alerts and Workflow.

## INTRODUCING THE SHARP TOOL COMPANY, INC.

A family-owned business with a legacy of over 60 years, The Sharp Tool Company specializes in saw blades, knives, and other cutting tools. Known for its commitment to quality products and honest service, The Sharp Tool Company has built a strong, positive reputation in the industry.



### Background

The Sharp Tool Company has a highly skilled team with extensive knowledge on carbide products, saw blades, knives and other products related to the cutting tool world.

Sharp Tool Co. delivers knowledgeable advice, top quality products, and the best possible service. To adequately meet their customers' needs, they stock a wide range of carbide products, circular saws, chipper knives, bits, shanks, grinding wheels, and supplies.

A service that sets the company apart from its competition is their unground "Toney" treated carbide pretinning – done IN HOUSE for the quickest possible turnaround. Sharp Tool Co. has been brazing for more than 50 years to meet customers' urgent product needs with the utmost quality, and can ship products the same day.

### Challenge

#### The Problem: Inefficient Processes & Missed Opportunities

The Sharp Tool Co. faced a pivotal moment when it recognized its existing processes were not scaling with the company's growth. Over the past few years, while they were experiencing an uptick in demand for their products, driven by their reputation for quality and fast turnaround, the outdated systems they relied on were creating significant challenges:

- ✓ **Growth Pressure:** With increased order volumes, the manual review process for customer interactions and quotes became untenable. Routine but time-consuming tasks, which were done manually, delayed critical response time and risked alienating high-value customers.
- ✓ **Profit Concerns:** Missed follow-ups and overlooked order details began to affect revenue. Several high-value accounts went dormant, leading to lost opportunities and a growing concern among leadership about the impact on long-term profitability.



## Solution

Stewart Tech sat down with Mike Morette, Vice President of The Sharp Tool Company, to discuss his priorities: operational efficiency and customer engagement. Mike had a clear mandate for Stewart Tech, to help them reduce manual processes, improve data visibility, and retain their most valuable customers.

Stewart Tech designed a solution that would streamline operations, provide actionable insights, and ensure Sharp Tool Co. could maintain its industry leadership without compromising service quality. With Sage Alerts and Workflow and Stewart Tech's guidance, the team created automated alerts and workflows targeting specific customer segments, including high-dollar customers who hadn't engaged in over six months.

## Results

Automating processes provided insights into potential revenue loss and helped the team catch and address important details that had previously been overlooked, like orders below cost or those needing billing, thereby reducing human error and improving efficiency. This implementation transformed business operations and improved the bottom line.

The Sharp Tool Company's streamlined operations are user-friendly, data-driven, and efficient:

- ✔ **Automated Follow-Ups:** Monitoring routine tasks ensures consistent engagement with customers every Tuesday at 2 PM, saving time, reducing errors, and enhancing customer satisfaction.
- ✔ **Data-Driven Decisions:** With Sage Alerts and Workflow, the company can drill into the data and proactively address current and potential manufacturing issues, allowing them to identify operational bottlenecks and uncover opportunities for improvement, thereby enhancing efficiency and reducing costs.
- ✔ **Targeted Customer Engagement:** Automated special alerts now reach key customers, ensuring they remain engaged and informed. This targeted approach was pivotal in reducing customer attrition and increasing sales opportunities.
- ✔ **Operational Efficiency:** Automating mundane tasks allowed the team to focus on strategic activities and other priorities without risking a late or forgotten report. Monday reports on open orders have become a cornerstone of their workflow, catching over 200+ crucial details weekly.

The Sharp Tool Company's experience with Sage Alerts & Workflow underscores the transformative power of automation in streamlining business processes and enhancing customer engagement.

"With Stewart Tech's assistance, we were able to leverage Sage Alerts & Workflows' capabilities to improve operational efficiency at our company and also strengthen our customer relationships. Automation was a game-changer for our business."

– MIKE MORETTE, VICE PRESIDENT



If you're ready to automate, optimize, or streamline your accounting and ERP processes, call on Stewart Technologies.

Visit the [Demos and Overviews](#) section of our website to see how Sage and Stewart Tech can better serve your accounting needs. Or [schedule a consultation](#) call with one of Stewart Tech's Sage-certified consultants.