

# SUCCESS STORY



## LEADING FINANCIAL SERVICES FIRM SEES UNPRECEDENTED GROWTH IN NEW ACCOUNTS, ASSETS RETAINED WITH SALESLOGIX

### KEY ACHIEVEMENTS

- SalesLogix selected after extensive evaluation of CRM options
- Three separate SalesLogix deployments accomplished in an average of 8 weeks each
- Consolidated customer data from databases kept by individual salespeople
- Eliminated manual tasks of building, tracking relationships
- New accounts up 62 percent
- Repeat customers' assets retained up 95 percent quarter over quarter

### CUSTOMER SUMMARY

- Leading financial services provider
- Nearly 350 SalesLogix users in two separate implementations
- Microsoft SQL server database
- 26,000 Records
- 5.5 GB Database
- Initial system rollout in five weeks

**This SalesLogix customer wishes to remain anonymous. But its story of success using SalesLogix is one we're glad we can share. That's because its salespeople have seen new account openings jump by 62 percent. Assets retained increased, from the same quarter a year earlier, by 95 percent! All since they started using SalesLogix, the mid-market CRM leader.**

They've asked us not to tell you their company name. But if we did, you'd recognize it immediately. It's one of the top financial services firms in the world, selling, among other products, investment programs to governments, organizations, and businesses of all types. We'll call it Company X.

Company X first became interested in a CRM solution when it realized its customer data was kept by individual salespeople in all kinds of files: spreadsheet programs, Microsoft® Access databases, and contact managers. There was no way to aggregate all the data efficiently to track sales activity. And if a salesperson left the company, well, just about everything the company knew about his or her customers left, too.

Add in the hours salespeople spent manually keeping their data updated, and Company X quickly came to the conclusion that it had a lot to gain from a full-fledged CRM system.

### AN EXHAUSTIVE EVALUATION PROCESS

The company's management team began a thorough search for the right solution, examining everything from contact managers to systems designed for the largest enterprises.

"We went through an exhaustive process," said Company X's business systems manager. "We had them come in, give the demonstrations. The people who would be using the system were involved as well."

Joan O'Connell, partner in CT Consulting and Training, a SalesLogix Business Partner, was one of those invited to participate. "We were interviewed at least three times," she recalled. "And we prepared customized demos of SalesLogix for them."

After seeing and hearing it all, the team at Company X chose SalesLogix. "The functionality SalesLogix provided and its customization features were the two driving forces," said the business systems manager. Company X also liked how well SalesLogix synchronizes with Palm handhelds, the quality of its remote access, and its security features. SalesLogix was also more cost-effective than the other candidates.

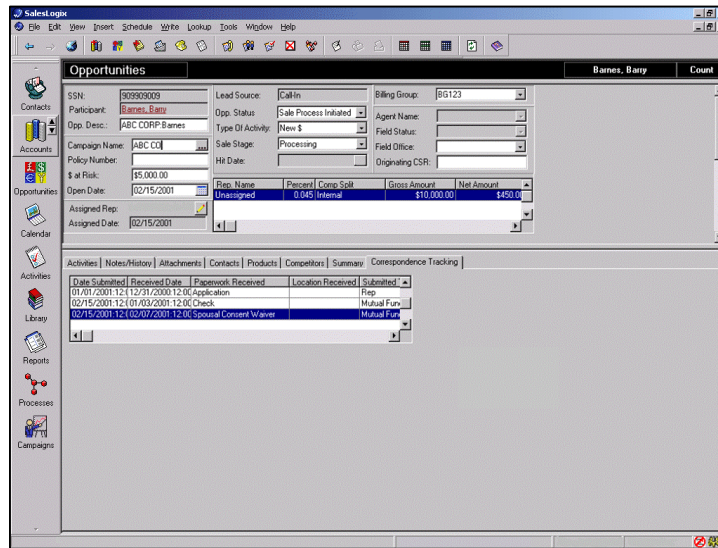
### IMPLEMENTATION PLAN THOROUGH, ACCOMPLISHED QUICKLY

Implementation of the new SalesLogix system went well. "The client did a phenomenal job on the implementation plan," O'Connell said. "Their IT people went to those who would be using the system and said, 'Tell us exactly what you want. What should this system do to be a success?'"

Once those needs were determined, the consultants from CT and Company X's IT department worked as a unified team. They added tabs and fields, and tailored the system to match the sales team's workflow. "Out of the box, SalesLogix met the majority of our users' needs," Company X's business systems manager said. "But there were things we wanted to tweak to make the product more useful or to streamline our salespeople's work processes."

## Company X's customized

Opportunities screen tracks not only typical opportunity data such as lead source, value, sales cycle, stage, and marketing campaign, but also split commission participation and receipt of the paperwork required close an opportunity.



In just five weeks, the system was ready to roll out to a pilot group of salespeople. "It was very successful," O'Connell said. "As we trained those initial users, they'd say, 'You know, so-and-so should have this, too.'"

Company X had planned to deploy SalesLogix to 60 users initially. By the time they accommodated everyone who wanted it, that number had risen to 140.

Since then, they've integrated SalesLogix with their back office system, accessing data that provides cumulative statistics about their customers.

## TWO MORE SALESLOGIX SYSTEMS DEPLOYED

That initial SalesLogix implementation was so successful that Company X decided a different sales team, serving a different type of customer, should have its own system. So, they went through the entire process again, except for the evaluation. This time, they knew SalesLogix was the right choice. This implementation required

a completely separate database, residing on its own server and with its own customizations. Time to rollout: eight weeks.

And then a third group of salespeople was brought in. This one could use one of the existing SalesLogix databases, but with its own views of the customer data. O'Connell said, "[Company X] asked if we could have 125 additional people up and running quickly." And nearly two-thirds of those people had ACT! databases that they had customized themselves. That meant each one had to be handled individually. Once again, the CT and Company X teams pulled together accomplishing the feat, including coast-to-coast training sessions, in only 12 weeks.

## IMPRESSIVE IMPLEMENTATIONS.

### IMPRESSIVE RESULTS

In all, Company X now has nearly 350 employees using SalesLogix. And the results are eye-popping:

- New accounts opened are up 62 percent
- Assets retained, a measure of individual customers who continue to buy products from Company X, are up from the same quarter of the previous year 95 percent

"I attribute it to enabling our salespeople to concentrate on their customer relationships," said the business systems manager.

O'Connell said, "I knew we'd achieved success when I heard that a deal they had been trying to close for three years finally went through. My understanding is that SalesLogix helped cement the relationship they'd been building. Their investment in SalesLogix paid off with just one sale!"

## BUSINESS PARTNER



CT Consulting & Training LLC specializes in high quality, professional consulting and training with a particular emphasis on sales force and marketing group automation. CT guides its customers through the process of choosing which CRM software and network platform is right for them.

CT's mission is to provide its customers with the most efficient sales force automation and network platform software on the market, therefore increasing their productivity.

For more information, visit CT Consulting & Training on the Web at [www.ct-ct.com](http://www.ct-ct.com) or call 203-656-4545.

Interact Commerce is the leading relationship management software provider for mid-market and small office/ home office businesses. Its easy-to-use products include mid-market customer relationship management (CRM) leader SalesLogix used by more than 3,300 businesses; and best-selling contact manager ACT! used by more than 3 million professionals and 11,000 corporations.

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