

# SUCCESS STORY



## SALESLOGIX: CRM FOR THE LONG RUN

### KEY ACHIEVEMENTS

- Using SalesLogix since 1998
- Easy, quick customization enables system to meet continuously changing needs
- Salespeople use SalesLogix eagerly, consistently while maintaining individual teams' successful practices
- Salespeople and managers select reporting criteria, eliminating need for IT to create custom reports
- SalesLogix enables company to focus on targeted customers and prospects



### CUSTOMER SUMMARY

- CDC IXIS Asset Management Intermediary Services
- Institutional marketing and service organization for global money management firm
- 22 employees
- 17 LAN-based users
- 5 Remote users
- Microsoft® SQL Server
- 16,000+ Contacts, 11,000+ Accounts
- 1.4 GB Database
- Initial system rollout in 30 days

**It's hard to find anything that lasts five years. Especially in the IT industry! But, investment powerhouse CDC IXIS has been using SalesLogix that long, continuously reshaping it to meet changing needs.**

CDC IXIS Asset Management Intermediary Services (AMIS) is a distribution arm of one of the world's 25 largest money management firms. It supplies sales and marketing support to help its affiliates grow their businesses.

At one time, the computer systems AMIS used were restricted to tracking contact names, addresses, and phone numbers – and little else. Its team realized it needed more than that, including:

- Asset tracking, so they see which contacts owned mutual funds across several affiliate fund families
- Daily sales team performance, tracking productivity as it related to marketing strategies and to each affiliate
- Consolidation of databases with 11,000 company records and 15,000 contacts
- Extensive customization
- A system friendly enough that salespeople would use it every day

Most important, AMIS couldn't afford to fool around with its implementation. It needed it done right – the first time. Although the company looked at GoldMine, Siebel, Maximizer, and Saratoga solutions, it decided to implement SalesLogix.

### FLEXIBILITY, SIMILARITY TO ACT! KEY TO CHOOSING SALESLOGIX

"Choosing SalesLogix wasn't hard," said Deb Well, director of MIS for AMIS. "SalesLogix had the flexibility we wanted

from an IT point of view. And it worked enough like ACT! to keep the salesforce happy, too." It should; SalesLogix is from the same people who make ACT!, the best-selling contact manager.

So far, this sounds like a fairly typical SalesLogix implementation story. What's surprising is that this selection process took place in 1998! Now, years later, AMIS is still using SalesLogix, adapting it to the company's ever-changing needs.

"Previously, every time we had a problem or question or wanted to make a change, we had to call the maker of the software we were using then. Changes were expensive, time consuming, and difficult – and the database structure had very little flexibility," she explained. "Now, as the business changes, it is very easy to change the database to accommodate new needs."

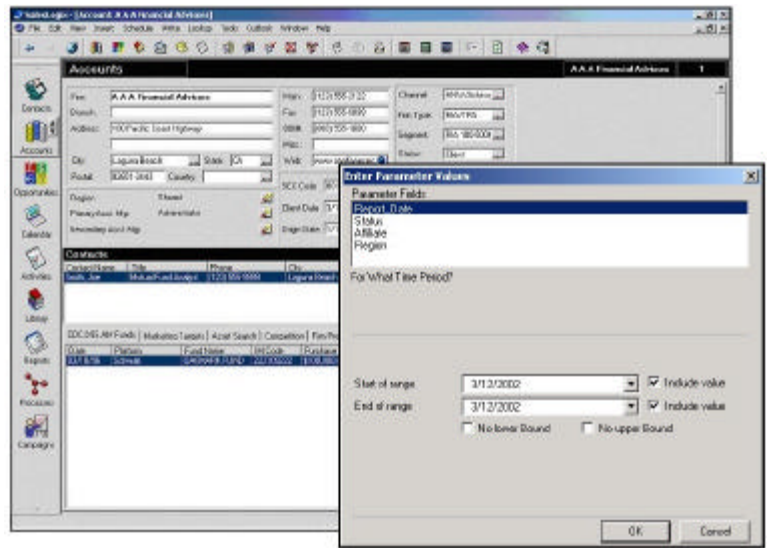
### "I HAVE PEOPLE USING SALESLOGIX WHO WOULD NEVER TOUCH A DATABASE"

For example, another CDC IXIS sales team was recently brought into the AMIS fold. Its members had been using Avenue, a product of Saratoga Systems®. "The challenge was to migrate their data and give them a much more functional platform from which to wholesale," recalled Well.

The system was so cumbersome that only half the sales team was using it. The rest would give handwritten notes to them to enter into the system. And sending e-mail to groups of customers required exporting data to Microsoft® Outlook, using it to send the messages, then importing the sent mail back into Avenue to record in customers' histories.

"Moving from that to SalesLogix has been a great thing for them," Well said. "I have people using SalesLogix who would never touch a database. They're so excited!"

The AMIS Account screen has been extensively customized to provide detailed information to sales reps. The Edit Parameter Values dialog box, foreground, is used by sales team members to choose the data they want to appear in reports. The dialog box is easy to use, but remarkably powerful.



SalesLogix has demonstrated that kind of flexibility over and over again. One of the teams AMIS supports is very account driven, with one salesperson for each sales territory. Another is more contact oriented, with as many as three salespeople working with a single contact. Fitting in with the successful practices companies already have is one of the things SalesLogix does best.

#### REPORTING, DATA IMPORT CUSTOMIZED

Reporting, too, has been extensively customized. Well has created parameter reports that enable sales team members to select the information they want included. Salespeople and managers get exactly the reports they want and there's no need for Well to run custom reports!

"SalesLogix has enabled us to focus on the customers and prospects we need to target for sales and marketing," Well said.

One way AMIS targets prospects for one 22-member inside sales team and its very large cross-selling channel is by incorporating into SalesLogix more than 8,000 investment records per month from a variety of industry databases. The data from other fund families is scrubbed, then made available to the company's salespeople.

"We have great tracking and access," said Well. "Another big portion of our business is also obtained through leveraged events, such as conference calls with portfolio managers. SalesLogix enables us to track those calls and analyze the data for trends."

#### THE CURE FOR THE "EVERY SIX MONTHS" SYNDROME

Well reports that the history and tracking features of SalesLogix are especially valuable as individual salespeople join and leave the company. "As people come and go, you have

what you need so business can continue and isn't lost because information walks out the door," she said. "That's also very valuable to the security of our business."

Still, it's the ability SalesLogix has to continually adjust to changing needs that Well talks about.

"I call it the every-six-months syndrome," she said. "Every six months, there seems to be a new twist and a new direction. And having SalesLogix means that every time that happens, our database adapts and changes with us. With SalesLogix, I don't have to wait. The changes are immediate and we're on top of things with no loss of time and no lag."

And in a continuously evolving business world, that's no small advantage!

## ABOUT SALESLOGIX



**SalesLogix** is a fully integrated, customer relationship management suite encompassing Sales, Marketing, Support, and eCommerce components. Used by more than 4,000 customers worldwide, SalesLogix solutions are:

- Highly customizable and proven
- Right-sized for any situation
- IT-resource friendly
- Affordable, offering a low total cost of ownership
- Intuitive and designed for maximum user acceptance
- Quickly deployable in LAN, Web or wireless environments
- Focused on providing a rapid return on investment (ROI)

Interact is the leading provider of relationship management software for mid-sized companies and small office/home office businesses. The company is known for building products that are easy to use, quick to deploy, provide integration with leading back-office solutions and give anytime, anywhere access to critical information. The company's products include SalesLogix, the leader in small business and mid-market CRM (customer relationship management) used by over 4,000 companies; and ACT!, the best-selling contact manager used by more than 4 million professionals and 12,000 corporations worldwide.

Interact is a subsidiary of the Sage Group plc, the leading supplier of business management software and related products and services to the small to medium sized business community worldwide.