

SUCCESS STORY



SALESLOGIX WEB CLIENT HELPS CONFERON GROW

KEY ACHIEVEMENTS

- Single, shared SalesLogix database replaced contact managers, spreadsheets, and multiple overburdened DOS-based packages
- System customized and maintained with minimal in-house IT staff
- Large, global sales staff uses system via the Web
- Efficient management of contacts, opportunities, and sales brought in by salespeople or over the Web
- Reporting, forecasting, planning more efficient, effective, and strategic



CUSTOMER SUMMARY

- Industry: Meeting planning
- Web site: www.conferon.com
- 200+ employees at corporate headquarters and five regional offices
- 25-30% growth per year for the past decade
- 150 Web-based users
- 9 LAN-based users
- Microsoft SQL server
- 9500+ records
- 140 MB database
- Initial system rollout in 45 days, including core customizations

The largest independent meeting planning company in the U.S. relied on overwhelmed and outdated systems to track its sales, opportunities, and customers. Then it discovered SalesLogix from Interact Commerce and learned how the mid-market CRM leader could help manage its ongoing double-digit growth.

Coordinating meetings might seem like a simple thing, but the work that goes into booking facilities and equipment and taking care of all the little details that contribute to a successful meeting is staggering.

That's why many companies turn to Conferon. In business for 30 years, Conferon is the nation's largest independent meeting planning company. They handle just about anything meeting-related: annual conventions, sales meetings, tradeshow, special events, and all types of customer-oriented functions.

Growing at double-digit rates for the past decade, Conferon books more than \$200 million just with hotels each year.

That kind of growth demands efficient management of sales and opportunities, whether they come from an ever-expanding worldwide sales staff or electronically via Web-based leads and electronic requests for proposals. Add the challenges of managing relationships with a burgeoning customer base and it's easy to see why Conferon began looking for a complete CRM solution.

LOTS OF CUSTOMER DATA; LOTS OF DIFFERENT SYSTEMS

That's where Centerprise Information Solutions and their expertise came into the picture.

"Conferon's salespeople were keeping track of sales and customers with contact management systems, spreadsheets, and an overburdened DOS-based system," said Wynne Chambless of Centerprise, a SalesLogix Business Partner. "Conferon needed a system that would be easy to deploy because they didn't have any technical people in their regional or home-based offices. And they wanted all the independent salespeople to use their new CRM system via the Web."

Additionally, Conferon wanted:

- Ease of use
- Rapid customization and implementation
- Territory management
- Security
- Overall cost effectiveness

After careful evaluation of their alternatives, it was SalesLogix that best fit the bill.

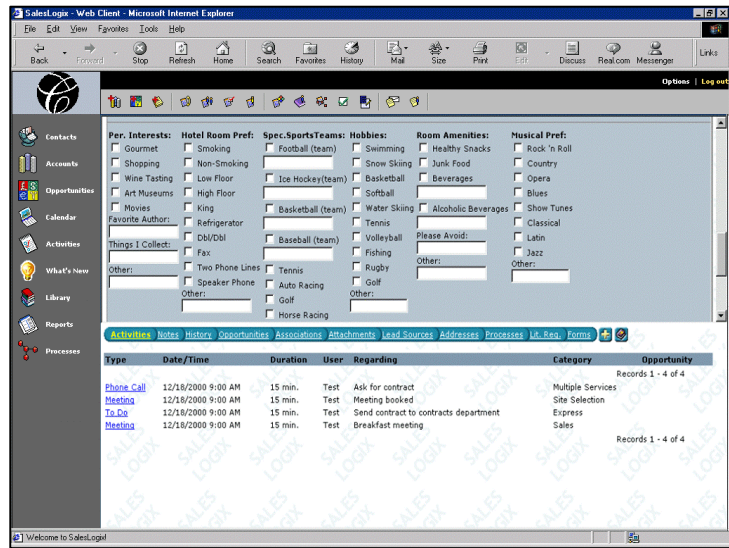
"We spent a lot of time looking at other solutions," said David Peckinpough, Conferon's vice president of sales. "We were actually halfway through the buying cycle with another solution, a system based on Microsoft Outlook.

"But we realized that with the addition of SalesLogix, all our customer-facing systems could be tied together," Peckinpough continued. "Our Sant automated proposal system integrates with SalesLogix and there's an interface to our MAS 90 accounting package, too. You can't imagine what that level of information sharing does to improve sales productivity and customer service!"

UP AND RUNNING IN JUST 45 DAYS

The first phase of the project was to bring Conferon's contact and account management into their new SalesLogix system. "We needed that for our critical data sharing," Peckinpough said. "We also

Viewed here from the SalesLogix Web client, Conferon's contact information goes beyond the usual, to record whether the contact prefers smoking or non-smoking hotel rooms and what amenities are desired, favorite sports teams, and taste in music.



knew that it would get all our people familiar with SalesLogix and ready for expansion of the system.”

This initial phase was rolled out in only 45 days, including several customizations. The sometimes-tricky process of importing data was straightforward, with data from the DOS-based system imported in less than a week.

“We don’t have a large IT staff, so Centerprise’s ability to develop and customize has been a big asset,” Peckinpaugh continues. “They’ve been our partners throughout the entire process, steering us away from potential pitfalls. Our relationship with them has really paid off for us.”

Formal training on the system began with a four-hour session that included setting up everyone’s laptop computers and workstations and a tour of SalesLogix. It continued with two weeks of e-mailed daily activities that provided practical experience. Ongoing training is accomplished with the help of Web-based training modules.

Centerprise and Conferon next added management of the company’s opportunities, including sales forecasting and financial tracking.

“I think the speed of implementation caught the company off-guard,”

Peckinpaugh said. “It was nice to surprise them with our ‘speed to market.’”

“A PROFOUND IMPACT ON OUR SALES FORCE”

Conferon now has about 150 employees using SalesLogix, all via the Web. And that number is continually growing.

“We’re quantum leaps above where we were,” Peckinpaugh said. “SalesLogix has had a profound impact on our sales force. Our people don’t even need to worry about connecting from remote locations. If they can get to the Web, they can use SalesLogix.

“It’s been very easy, very friendly, very logical for our salespeople. We haven’t had to force the system on them at all. It makes sense to them and matches their workflow.

“We now have a central source for sharing account information among our account executives, account planners, meeting managers, and our small business

department,” he continued. “SalesLogix has enabled us to define our sales process and we have a much better picture of deals in the pipeline and their status.

“We’re generating customized bi-weekly sales reports showing all our opportunities and forecasting by product stream and status. We’re able to operate in a much smarter manner overall, much more strategic about how we sell and work with our customers.

“SalesLogix has become part of our daily sales process and a critical tool for our future growth,” Peckinpaugh concludes. “Every time we’re in a strategic planning session, our thought process immediately turns to how we can integrate whatever we’re talking about into SalesLogix.

“It’s one of the best investments we’ve ever made.”

BUSINESS PARTNER



Centerprise Information Solutions serves as the technology-consulting

arm for Centerprise Advisors, Inc., a national professional services firm with 950 professionals serving over 15,000 clients. Centerprise Advisor's breadth of capabilities provides middle-market clients a strong platform to achieve extraordinary results.

Centerprise Information Solutions specializes in Financial Application system selection, implementation, training, on-going technical support and integration with e-Commerce and Customer Relationship Management (CRM) solutions. For more information, visit <http://www.wecansolve.com>

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 3,000 businesses; and best-selling contact manager ACT! used by more than 3 million professionals and 10,000 corporations.

Its easy-to-use products implement fast for anytime, anywhere access to critical information. SalesLogix integrates with leading back-office software for a complete view of the customer. Distributed and sold in 60 countries worldwide, SalesLogix and ACT! dominate the high tech, real estate, financial services, manufacturing, marketing, and consulting industries. Interact Commerce is in Scottsdale, AZ (www.interactcommerce.com).