

# SUCCESS STORY



## SALESLOGIX HELPS BUILD HERITAGE LOG HOMES SALES BY 24%

### KEY ACHIEVEMENTS

- Sales up 24 percent
- Thousands of previously "lost" Web, phone, and in-person leads now receiving follow-up
- 27 years of data in multiple databases consolidated
- All information about a customer's home now stored in SalesLogix for better access
- Dealers access customer info via the Web
- Nine views of the database created for various users



### CUSTOMER SUMMARY

- Custom-designed and engineered log home construction packages
- 75 employees; 80 independent dealers
- Initial system rollout in three weeks
- 40 LAN-based SalesLogix users
- 55 Web-based SalesLogix users
- Microsoft® SQL Server
- 86,000 contact records
- 716 MB Database

**Just one visit to the Heritage Log Homes Web site at**

**[www.heritagelog.com](http://www.heritagelog.com) will have you dreaming about living in one of those beautiful log homes.**

**Unfortunately, companies that work to fulfill people's dreams often have nightmares of their own. For Heritage, it was trying to keep up with the mountains of incoming leads.**

Duane Schmitt, the company's MIS Director, said, "We had 15,000 leads no one was following up on," largely because they couldn't adequately manage the tremendous volume of leads. "That's just like throwing them in the trash!" he continued.

Heritage was using a contact manager to track its prospects and customers, but business was growing and, as Craig Bull, general manager, noted, "It didn't offer the flexibility to do things we wanted to do."

But, solving the problem would be no easy task. While needing a better way to manage new leads, the company also had 27 years of data it had to preserve and use. And many records overlapped with data stored in other databases.

That lack of cohesiveness really hurt. "We could have multiple salespeople working on one lead, with no way of coordinating our efforts or knowing who really owned the lead," said Schmitt.

### SALESLOGIX "FIT OUR NEEDS"

The team at Heritage began a search for the right CRM solution, looking at several possibilities.

"We chose SalesLogix because of how much it could be customized," Schmitt said. "With a lot of other systems, you get *their*

front-end and there's not much you can do about it. With SalesLogix, you can build almost anything you want to. It's extraordinarily versatile. We believed we could do pretty much anything we wanted to make it fit our needs."

Heritage also chose certified SalesLogix Business Partner Extremely Productive to implement the solution. Josh Ovet, president of Extremely Productive, and Schmitt began by asking Heritage's salespeople and dealers what they wanted from the system. Schmitt explained, "I sit down a lot with the salespeople and dealers, because they're the ones who are going to be using the system. If you can make it easy for the salespeople to use, it'll be a no-brainer for them." And that kind of buy-in is essential to CRM success.

### INITIAL ROLLOUT IN THREE WEEKS

Ovet said, "Heritage was dedicated to working through a process to implement their system. We took it in phases."

Their first goal was to get the company's inside sales reps on the system. That initial rollout was accomplished in just three weeks and included consolidating the data from all those individual databases into one.

"Before, all the pieces of the puzzle were kept in multiple databases," Ovet recalled. "The engineering department had a database, accounting had a database... And no one was talking to one another." Now all that information is stored in – and accessible through – SalesLogix.

"Twenty-four hours a day, seven days a week, anyone who needs it can look at the status, notes, and everything else related to that customer," Schmitt said.

But bringing it all together in SalesLogix doesn't mean different departments have to wade through

The electronic version of Heritage Log Homes's Red File holds all the information about a particular customer's home. Different departments are permitted by SalesLogix to add or modify various pieces of data in this window, but all departments can access the information for a complete view of the customer and project.

mountains of data to find what they want. "We created nine different views of the database for the various people at Heritage," said Ovetv.

#### DEALERS RECEIVE LEADS FROM SALESLOGIX VIA THE WEB

The next big milestone was to add Heritage's dealers from around the U.S. to the system. That was accomplished in another six weeks, providing dealers with the tool they needed to manage their pipelines and receive new sales leads as often as twice a day.

Those leads pour in through Heritage's Web site, over the telephone, and during open houses and other events. For example, visitors to the Web site who want to download brochures fill out an information form. That data is now imported into the SalesLogix database and

automatically routed to either the correct region's dealer or to Heritage's in-house sales team.

Even with these sophisticated customizations, Schmitt reports no problems with the day-to-day administration and operation of SalesLogix. "It's been very smooth and stable," he says. "We've never had any problems."

#### SALES UP 24 PERCENT

To say that Heritage's salespeople have begun using SalesLogix with real enthusiasm would be an understatement. Take Darryl Wilson for example.

"Before, we had a scattered situation," he said. "It was hard to stay organized and on top of our prospects. SalesLogix has enabled me to keep up with my customers and meet their needs. That encourages them to tell others about the great service they're getting,

and that can only lead to good things." Good enough that Wilson has gone from being one of the company's – well, let's say – "less successful" sellers to one of their top.

In fact, overall, sales by Heritage's entire sales team have increased by 24 percent. "I'm not sure I can attribute all of that to SalesLogix," General Manager Bull said, "but I'm sure it plays a big part.

"I've heard the comment from customers, saying why they bought from Heritage, 'You called me back.' Follow-up and communication are key to the sales process. With the number of leads we receive, it's next to impossible to do that manually. Using SalesLogix has brought a lot of prospects to the top and given us a bull's eye of who we need to focus on."

## BUSINESS PARTNER



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