

CUSTOMER SUCCESS



## CNL Investment Company: “Vision Creating Value” With Sage SalesLogix

CNL Financial Group represents approximately 3,000 retail, restaurant, hospitality, retirement, corporate office, and industrial properties in 49 states, with combined assets of more than \$8 billion. CNL Investment Company (CNL) is the support arm to its sales division, raising capital to purchase real estate and pay investor dividends.

The sales group manages more than 70,000 records in its customer database, 700 items in its promotional item inventory, and complicated SEC, NASD, state, and broker/dealer regulations governing fulfillment. To manage the load, it recently re-engineered its internal processes and implemented Sage SalesLogix to handle these requirements. The expertise and support of their reseller speeded development of the system and delivered value to end-users very quickly.

### Superior Sales Management

“Sage SalesLogix is the only application software used in our organization besides Office,” says Constantine Blinkov, director of business infrastructure at CNL. “It does everything for us, from storing customer account information to managing the materials that get printed in our mailroom.”

CNL relies on Sage SalesLogix to serve its diverse base of wholesalers. “The system allows wholesalers to track all account activities, set sales goals for individual contacts, establish marketing budgets, and even invite prospects to due diligence seminars,” Blinkov notes. “Wholesalers can order personalized thank-you cards or letters, and the correspondence is automatically processed through Sage SalesLogix. The system pulls up the contact’s address, prints out the card or letter and adds the correct signature, all with a significantly reduced risk of human error.”

Sage SalesLogix maintains CNL’s inventory on a FIFO basis, managing hundreds of pieces of literature and promotional items.

### Controls and Custom Features

Sage SalesLogix is flexible enough that CNL can build in their own business rules that dictate actions based on conditions being met. For example, when it comes to literature orders, CNL is restricted from sending any product-related materials to broker/dealer representatives around the country until they are authorized to sell the product. If a rep tries to make a literature request to an unauthorized broker/dealer representative, Sage SalesLogix puts the order on hold and prevents

**Customer:**

**CNL Investment Company**

**Industry:**

Real estate investment and financial services

**Location:**

Orlando, Florida

**Number of Locations:**

Three

**Number of Employees:**

785

**System:**

**Sage SalesLogix**

**CHALLENGE**

Manual contact and sales tracking system offered only rudimentary customer relationship capabilities and made sales management cumbersome.

**SOLUTION**

Sage SalesLogix was deployed to 30 mobile wholesalers on Compaq TC1000 Tablet PCs and to 80 home-office employees to manage the entire sales cycle.

**RESULTS**

Sage SalesLogix provided the common infrastructure necessary to manage growth for a sales team that tripled, and a ten-fold increase in sales—bringing revenues to more than \$2 billion for the year.

the fulfillment form from being printed in the mailroom until CNL receives a broker/dealer authorization.

With Sage SalesLogix, CNL managers can easily analyze sales and contact-related activities by account manager or region to gauge team effectiveness. With a click of the mouse they can determine top sellers in a territory, or assess sales team productivity based on the number of meetings and phone calls being made each week. This provides the management team with critical business data for decision-making that was not available prior to implementing Sage SalesLogix.

“The greatest strengths of Sage SalesLogix are its flexibility and customization capabilities,” Blinkov notes. “Sage SalesLogix is the Lego of CRMs. We were able to customize the system so that all of our crucial business processes are run through Sage SalesLogix—from literature fulfillment to sales and activity analysis. Through customization, all of our industry’s unique requirements are reflected in our automated processes, thus reducing or eliminating a chance of regulatory compliance problems.”

What bottom-line benefits has CNL seen since adopting the new application? “Over the last several years our sales team tripled and our sales increased ten-fold. With Sage SalesLogix we were able to manage this growth and still preserve our trademark customer-centric focus,” Blinkov says.

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Corporate Offices

<b>Orange County, California</b> 23161 Mill Creek Drive Laguna Hills, California 92653 Phone: (949) 583.9500 Toll Free: (800) 425.9843 Fax: (949) 583.0649	<b>Atlanta, Georgia</b> 1100 Johnson Ferry Road, Ste. 450 Atlanta, Georgia 30342 Phone: (404) 841.6240 Toll Free: (800) 455.1368 Fax: (404) 841.6243
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**www.blytheco.com**      **solutions@blytheco.com**

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