



CUSTOMER SUCCESS STORY

CUSTOMER

Conferon

INDUSTRY

Meeting Planning

LOCATION

Cleveland, Ohio

Number of Locations

Six

Number of Employees

200+

SYSTEM

Sage CRM SalesLogix
 Sage CRM SalesLogix DynaLink
 Sage MAS 90

Sage CRM SalesLogix Web Client Helps Conferon Grow

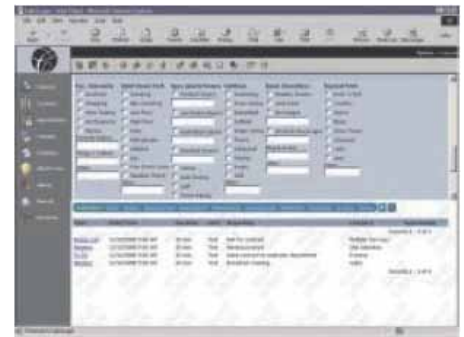
Meeting planning may seem simple, but the work that goes into booking facilities, coordinating equipment, and handling staffing to make successful meetings and events is staggering.

That's why many companies turn to Conferon, the nation's largest independent meeting planning company. For more than 30 years, Conferon has flawlessly executed annual conventions, sales meetings, tradeshow, special events, and all types of customer-oriented functions.

At double-digit growth rates for the past decade, Conferon needed a way to efficiently manage sales and opportunities, whether they came from an ever-expanding worldwide sales staff, electronically via Web-based leads, or via email requests for proposals. Thus, the search began for a complete CRM solution.

Data in Disparate Systems

"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 XBSS, LLC, a Sage CRM SalesLogix Business Partner. "Conferon needed a system that would be easy to deploy and that would allow independent salespeople to use the system via the Web."

"We spent a lot of time investigating solutions and were actually halfway through the buying cycle with another one," said David Peckinpaugh, Conferon's vice president of sales. "However, we realized that with the addition of Sage CRM SalesLogix, all our customer-facing systems could be tied together," Peckinpaugh continued. "Our Sant automated proposal system integrates

CHALLENGE

Conferon was using an outdated system to track its sales, opportunities and customers. It needed a CRM solution with strong opportunity management and the ability to integrate with existing software.

SOLUTION

Sage CRM SalesLogix integrated with their Sage MAS 90 accounting system and Sant, their automated proposal system.

RESULTS

With Sage CRM SalesLogix, Conferon has seen more efficient and effective reporting, forecasting and planning throughout their internal and external sales teams so they could maintain their double-digit growth rates.



Your business in mind.

"Sage CRM SalesLogix has become part of our daily sales process and a critical tool for our future growth. Every time we're in a strategic planning session, our thought process immediately turns to integration into Sage CRM SalesLogix."

—David Peckinpaugh
Vice President of Sales

ABOUT SAGE SOFTWARE

Sage Software has been responding to the needs, challenges, and dreams of small and mid-sized businesses for over 25 years. With a complete range of business management solutions and services, Sage Software helps companies improve customer relationships, reduce costs, and automate and integrate a variety of operational activities. Its solutions support the specialty needs of a broad scope of industry segments, including manufacturing, distribution, construction, real estate, nonprofit, and professional services.



with Sage CRM SalesLogix, and we use Dynalink to interface with our Sage MAS 90 ERP accounting package. You can't imagine how information sharing improves 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 Sage CRM SalesLogix. "We needed to start there to enable data sharing, which was critical for our success moving forward," Peckinpaugh said. This phase was rolled out in 45 days, including importing data from multiple legacy systems and several customizations.

"We don't have a large IT staff, so XBSS, LLC's ability to develop and customize has been a huge asset," Peckinpaugh continues. "They have been instrumental in steering us during this process and our relationship with them has been invaluable."

Formal training began with a four-hour session including laptop set-up, workstations, and a tour of Sage CRM SalesLogix. This was followed by two weeks of e-mailed activities giving the reps practical experience using the system. "I think the speed of implementation caught the company offguard," Peckinpaugh said. "It was nice to surprise them with our speed to market."

Profound Impact on Sales Force

Conferon now has 150 employees using Sage CRM SalesLogix through the Web, and that number is continually growing. "We're quantum leaps above where we were," Peckinpaugh said. "Sage CRM SalesLogix has had a profound impact on our sales force."

"It's been very easy, friendly, and logical for our salespeople. We haven't had to force the system on them. 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. "Sage CRM SalesLogix has enabled us to define our sales process; we have a clearer picture of deals in the pipeline and their status."

"Sage CRM SalesLogix has become part of our daily sales process and is a critical tool for our future growth," Peckinpaugh concludes. "Every time we're in a strategic planning session, our thought process immediately turns to integration into Sage CRM SalesLogix. It's one of the best investments we've made."

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