

CUSTOMER SUCCESS



## Grant Thornton Brings CRM Under Control With Sage SalesLogix

Two years ago, Chicago-based Grant Thornton had CRM software applications scattered throughout a dozen offices. Included were ACT! by Sage—the most common—as well as GoldMine from FrontRange Solutions, TeleMagic, Excel spreadsheets, and various homegrown concoctions. Each office had a standalone database.

Shawn Danu, Grant Thornton’s manager of marketing and sales systems recalled, “We were ready to implement GoldMine but Harris Technology, one of GT’s top business partners, cautioned that the software would not scale to an enterprise-wide level. Also, GoldMine had synchronization problems and used a business-to-consumer data model that did not offer full customization capabilities.”

“Harris recommended Sage SalesLogix—it had all the CRM capabilities we needed plus excellent synchronization,” Danu said. “Harris was our implementation partner for the Sage SalesLogix software, a process that went very smoothly. They continue to provide top quality support.”

Founded in 1924, Grant Thornton’s accountants and business advisors serve middle-market clients through offices in the United States and 110 countries worldwide. Revenues total \$1.84 billion with the U.S. accounting for \$400 million. The company employs approximately 23,000 people. Nearly 3,000 staff members and 311 partners are located in 51 offices within the United States.

“More than 150 people in the U.S., including 25 sales people, are using Sage SalesLogix,” Danu continued. “We also have a growing base of users in accounting and HR.”

### First Call to Final Close

The sales staff is using Sage SalesLogix to track contacts, generate leads, and follow opportunities from the first phone call to the final close, while Marketing uses it for event management to track mail campaigns.

“Our salespeople in the field use laptops,” Danu explained. “We replaced a manual synchronization process by implementing a Citrix Metaframe Solution Suite, which provides centralized, real-time

**Customer:**

**Grant Thornton**

**Industry:**

Accounting and business advisors to middle-market clients, both public and private, in the U.S. and around the world

**Location:**

Chicago, Illinois

**Number of Locations:**

Offices in the United States and 110 countries worldwide

**Number of Employees:**

23,000

**System:**

**Sage SalesLogix**  
**Sage SalesLogix KnowledgeSync**

**CHALLENGE**

Consolidate a variety of heterogeneous CRM functions and integrate a new system with various back-office functions.

**SOLUTION**

Implementation of Sage SalesLogix and a number of compatible tools to handle everything from lead generation and contact management to event management.

**RESULTS**

Sage SalesLogix has replaced the various CRM systems and achieved high levels of user satisfaction among the sales force, marketing and management for its ease of use and efficient operation.

access to the Sage SalesLogix database. Our network includes a WAN with four main hubs, regional LANS, and a VPN that employees can use for secure communications when on the road."

"In the data center, four servers run the CRM system," Danu continued. "The synchronization server runs Sage SalesLogix KnowledgeSync, which we use to process data submitted to forms on our Web site. KnowledgeSync processes the data directly into Sage SalesLogix and then sends an alert to the primary owner of the form. In addition, we can now track bad or undeliverable e-mail and correct it in Sage SalesLogix."

Danu added that because of the flexibility of the product, the company has been able to use a number of add-on solutions from the Sage SalesLogix partner community, such as Z-Firm's OmniRush for handling mass e-mails and electronic newsletters and Mailroom Toolkit from Satori Solutions.

**Integration Present and Future**

"Sage SalesLogix is integrated with our Human Resources (HR) database," Danu said. "We can identify who owns the account relationship and coordinate activities, allowing us to share information and work as a team. We are planning to integrate our CMS (billing) system with Sage SalesLogix so we can track each closed-won opportunity through its entire billing cycle. This will be a huge milestone."

"The Sage SalesLogix module that includes analytical tools and full-scale marketing campaign management is currently being customized and will be in operation later in 2003. In addition, we have plans to deploy the Sage SalesLogix Web-based capabilities. Sage SalesLogix will become the single point of entry to these and other systems used by sales, marketing, and management."

"The sales force likes the fact that Sage SalesLogix allows them to easily see and share information," Danu concluded. "The back-office accounting and HR teams are able to do their jobs more efficiently, and our IT organization is at the cutting edge of CRM technology."

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