

CUSTOMER SUCCESS



Sage Software Keeps Leading Indicator Systems on Track

Based in Lexington, Massachusetts, Leading Indicator Systems (LIS) develops and implements innovative work force survey solutions that help clients collect, analyze, and dynamically present assessment findings in unique ways. Employing a fully integrated process, LIS measures and tracks organization performance—from data collection to processing, statistical analyses to visualization, and reporting of findings to action planning.

With a growing clientele, LIS recognized the need to automate and standardize business processes and better control its sales and marketing pipeline. To maximize sales opportunities, the company wanted a hosted customer relationship management (CRM) solution, which would also allow real-time information to be shared company-wide and with key investors.

Rapid Growth Prompts Need for CRM Solution

“We lacked the right tools for maximizing the sales opportunities in our pipeline,” says Kelly Wennik, business development manager at LIS. “All employees had their own systems in place to keep track of contacts and activities, and sharing information often meant typing up summary reports of prior activities, which was a time-consuming process, even with e-mail.

“We are a rapidly growing company and it was very important for us to fully automate our business systems in order to move to the next level,” says Wennik. “With the successes we were achieving with our corporate clients, we needed the proper tools to help us leverage these successes and quickly reach out to new prospects. We didn’t want to reinvent the wheel every time we launched a new sales or marketing campaign.”

Hosted CRM System Brightens Future

LIS examined several hosted CRM products that promised instant deployment, minimal upfront investment, and adaptability. However, many offered inadequate flexibility and visual onscreen displays, making it necessary to jump from screen to screen to locate requested information when engaged with a client on the telephone. Says Wennik, “These products were challenging and time-consuming. They offered inadequate flexibility and visual display onscreen; they behaved more like fancy worksheets.”

Customer:

Leading Indicator Systems

Industry:

Organizational assessment/
survey/diagnostics

Location:

Lexington, Massachusetts

Number of Locations:

One

System:

- SageCRM.com

CHALLENGE

LIS needed a comprehensive, easy-to-use CRM package that delivered the benefits of instant deployment, minimal upfront costs, and powerful capabilities for automating business processes.

SOLUTION

SageCRM.com provides full sales force, marketing, and customer care automation—and can be easily accessed from a Web browser or through a wireless PDA device.

RESULTS

SageCRM.com improves marketing pipeline management and enhances client service.

On the recommendation of a networking contact, LIS discovered SageCRM.com, a hosted version of the Sage CRM solution, and previewed it at a SageCRM.com Webcast. With an emphasis on power, ease-of-use, and highly visual data displays, the solution was exactly what LIS wanted. "We loved the highly visual nature of SageCRM.com," says Wennik. "The most beautiful part is the interactive, visual representation of the pipeline by stage, which provides a snapshot of the sales cycle from first contact to final sale. This feature allows our sales teams to effectively analyze and manage the sales pipeline and facilitates tactical planning sessions."

Hosted CRM Offers Incomparable Flexibility and Value

After signing up for SageCRM.com, LIS was up and running almost instantly. Highly customizable to suit individual business needs, the application has streamlined LIS's procedures for creating and tracking sales and marketing campaigns. "This is one of the most flexible tools I have ever used," says Wennik. "I can quickly and easily modify the way my screen looks by adding fields or making other changes. If I don't know how to make a change to my screen on the spot, I can always consult a Sage Software online tutorial to get the information I need."

"This program does it all," says Wennik. "We're getting the benefits of a full-featured CRM solution at significantly less cost than comparable on-site CRM packages. We can get all the information we want on one screen and, with the application's easy-to-use visual display, we have the perfect tool for managing our pipeline. SageCRM.com is everything we were looking for."

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Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

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