



SUCCESS STORY



The mid-market CRM leader.SM

Systems Group takes next step in service

KEY ACHIEVEMENTS

- Basic SalesLogix system rolled out over a weekend to every desktop in the company
- 6,000 duplicate customer records were identified and merged with SalesLogix
- Advanced Sales module added to create sales reports and forecast future performance
- Customer visits can be recorded by mobile staff on their laptops and synchronised remotely with the central database



CUSTOMER SUMMARY

- Industry: IT solutions and training provider
- Created from the merger of three divisions
- Customer information from three separate sales teams drawn together using SalesLogix
- Microsoft SQL Server and Windows NT

Putting CRM solutions into practice is often complex. One company that knows this challenge well is Systems Group International. Following the merger of its three divisions: solutions, training and network utilities and resourcing, this enterprise-based network solutions supplier brought SalesLogix on board to handle the amalgamation of three sales teams and all their customer information.

Systems Group's new sales team sells consultancy services to large companies, from solution selection and resourcing, to hosting training schemes for IT users. To cross-sell within these areas, sales staff need access to a broad range of information, such as details of course or product availability, combined with customer histories and profiles. However, because this information was fragmented across the company, service sometimes suffered and sales opportunities could be missed.

Geoff Worsley, IT Project Manager at Systems Group International, explained the problem: "Each group had its own way of keeping customer records. One used ACT!, one used an Access database system and another relied mainly on account managers' notes."

This disparity led to poor communications among the sales team and with customers. The various locations and forms of data meant that customer information was often unavailable or incomplete.

Another problem was that one customer's account could be serviced by up to four staff. Without a way of accurately tracking communications, customers would often be contacted several times unnecessarily. This also led to customers not knowing whom they should approach with account queries because there was no clear point of contact for any one customer.

Collating customer information in one centralised system was the obvious solution, but in System Group's busy sales environment no-one had time to waste re-keying data or moving it from one system to another.

The cost of information

For Systems Group, the lack of integrated customer information was leading to wasted time and potentially lost sales. Worsley explained: "We realised that there were a lot of people wasting a lot of time, following up leads that had already been actioned. Because our systems weren't talking to each other, our staff had to shout across a desk



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**Geoff Worsley,
IT Project Manager,
Systems Group International**

to find out whether so and so had spoken to a customer.”

Systems Group prides itself on giving customers the highest level of customer service and so knew it had to act in order to protect its reputation and contain the costs of collecting and storing customer information. Worsley commented: “Thankfully, we didn’t work out how much this inefficiency was costing us. But in order to keep our customers’ confidence, we knew we had to find a way to accurately manage customer information and make it available to our staff.”

Choosing a solution

Systems Group had two clear choices: to standardise on one of its three current methods for managing customer information, or choose one of a range of CRM solutions on the market.

The first option was rejected because none of the methods the company was using could support the company’s e-business needs, nor the needs of its remote staff. The company agreed that this

need could not be addressed internally, so it sought external help. However it also wanted to avoid committing to a major CRM investment until it could prove the solution’s value in practice. Systems Group therefore sought a modular, scalable CRM solution that could be extended, as and when the need arose.

Integration was also very important. A solution was needed that would integrate simply within its Microsoft based environment and run on SQL server, Windows NT workstations as well as the company’s laptops and PDAs so that it would support the company’s mobile workers.

One of Systems Group’s IT managers saw an advertisement for SalesLogix from Interact Commerce. “It seemed to have everything we were looking for,” said Worsley, “so we contacted Interact Commerce and asked them for a list of SalesLogix resellers.”

Of the list of resellers it was sent, Absolute Computer Solutions Ltd was chosen as the ideal partner, being located just a few miles down the road from Systems Group’s head office in Woking. Worsley was particularly pleased with this choice because, he said: “Absolute were totally independent, so they could rate a number of products for us, based purely on the solution’s merits.”

The company tested SalesLogix against other CRM solutions from Goldmine and Royal Blue. When compared to the company’s list of requirements - speed of development, scalability, ease of use and ease of integration - SalesLogix came out on top. Its modular nature meant that the company could make a relatively small investment up front, and yet gain a long term, profitable CRM platform for the future.

Worsley commented: "We wanted a solution that could be built up over time. Initially we weren't sure whether we would just have a limited number of sales staff using it, or all our consultants. We chose SalesLogix because it provided us with the freedom to develop a broader CRM strategy in the future."

Taking SalesLogix to the salesfloor

Systems Group was under pressure to install the solution as quickly as possible. However, because of millennium compliance issues, it had to carry out the full pilot within six weeks. Four salespeople who had various degrees of experience using CRM solutions tested the solution. This proved successful and the basic SalesLogix system was rolled out by Absolute over a weekend to every desktop in the company.

Since then, Systems Group International has used the application to merge more than 6000 duplicate customer records, eliminating multiple mailings. It has also been able to streamline the way accounts are handled. Worsley commented: "Previously we had up to four people working on just one account because each customer could have a contact for training, networks solution, general sales and consultancy services. But with SalesLogix, we have centralised information, which means just one worker can coordinate all activity on an individual account."

Designed to meet growing needs

During the first few months of 2000, Systems Group used SalesLogix to transfer existing customer data into a centralised database. It then expanded the use of the software, adding its Advanced Sales Solution module, to create sales reports and forecast future performance. This allowed the company to gain an instant overview of sales performance and

reduce the amount of time required to prepare weekly sales reports. Also, the ability to quickly communicate progress to staff via the application has significantly reduced the amount of time spent in review meetings.

Systems Group also integrated SalesLogix's Customer Training and Scheduling module.

This automates many of the processes involved with selling training courses. Previously, a sales administrator would enter course details into an Excel spreadsheet that would then be forwarded to the marketing department and published in the course brochure. This document would then be sent to web administrators who would transform it into HTML and upload it onto the website. Finally, the sales staff would be given a copy from which to sell course places to its customer database. Unfortunately this process took up to a week to complete and so course availability data was often out of date.

With the new CRM system in place, the course administrator enters information directly into SalesLogix and it is automatically available to all staff. "This has reduced the time required to administer



courses by around two thirds and because SalesLogix is continuously updated, our sales staff know instantly which courses have places left so we can direct sales," said Worsley. "This has dramatically reduced the costs and time required to market courses."

Delivering SalesLogix to the web

Systems Group is currently planning to roll out another function of SalesLogix - e-Leads. e-Leads is a web feedback facility which converts messages sent through the website into active sales leads within SalesLogix. This will significantly reduce the amount of time it takes to respond to an emailed customer enquiry. "At the minute," said Worsley, "an email through the site goes to an administrator, who passes it to the marketing department, who qualifies the enquiry, then forwards it to our salespeople. This can take up to a day. With SalesLogix, we will be able to respond in a fraction of the time."

More information of better quality

SalesLogix has not only increased the amount of customer information available to staff, but has also given managers a

valuable insight into staff performance. For example, the company holds cold calling sessions where everyone has to make 50 customer calls. Before the introduction of SalesLogix, it had no way of tracking the productivity of these calls. Worsley explained: "We knew people were on the phone, but we didn't know how well they were performing. Now we know who, when, and why our salespeople are calling and can measure their performance. That's invaluable information."

Another area of benefit is supplying information to mobile workers. These teams visit customers to sell products or to provide consultancy services. With SalesLogix, mobile staff can now not only record customer visit reports on their laptops, but also synchronise them remotely with the central database and so have instantly updated information in front of them when they meet the customer.

But the most important development for Systems Group has been the increased focus on selling using SalesLogix. Worsley

explained: "Our directors are pleased with the way we are now responding to customers due to the improved availability of information. We've worked really hard to make everyone here an unofficial salesperson and SalesLogix has contributed an enormous amount in terms of delivering the right information, wherever its needed. Our staff now spend more time selling and providing high quality customer care and less time on admin, which makes everyone, from staff and customers to the Directors, very happy."

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About Interact Commerce

Interact Commerce is the leading provider of relationship management software for mid-market companies and small office/home office businesses. The company is known for building products that are easy to use, quick to deploy, and provide anytime, anywhere access to critical information. The company's products include SalesLogix, the mid-market CRM leader (customer relationship management) used by over 3500 companies; and ACT!, the best selling contact manager used by more than 3.2 million professionals and 11,000 corporations.

Through integration with leading back office software solutions, SalesLogix provides a complete view of the customer. Both SalesLogix and ACT! dominate in their respective markets, including high tech, financial services, manufacturing, marketing and consulting industries. Interact Commerce products are sold in 67 countries worldwide both direct and through value added resellers. With USA headquarters in Scottsdale, Arizona, and European HQ in Slough, Berkshire, UK, plus nine further offices around the world, the company can be found at www.interact.com

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