

CUSTOMER SUCCESS



## Sage SalesLogix Gives Winged Victory an Educational Tour of CRM

The Winged Victory family of companies has been providing educational tours to students, spanning the rich histories of cities such as Boston, Chicago, Miami, Montreal, New York, Philadelphia, Quebec, Toronto, and Washington DC, since 1986. These tours offer students an exciting learning experience that keeps them and their teachers coming back. When entrepreneur and company president, Mike Cleary, purchased managing interest in Winged Victory USA, he saw great potential to expand the sales of these popular tours and embarked on his own educational tour of customer relationship management (CRM) solutions to help achieve his vision.

Prior to Cleary, Winged Victory’s sales team used Word, Excel, and Access to track customer information. None of this information was linked, making it difficult to keep up with current customers and prospects. Cleary knew that in order for his company to be successful with its customer relationships, it had to streamline its sales processes.

### An Affordable Solution

Cleary’s initial foray into CRM was with ACT! by Sage, the best-selling contact manager from Sage Software. As his business continued to grow, Cleary realized that his organization was ready for a robust CRM solution. He considered GoldMine but ultimately selected Sage SalesLogix, a natural migration path because of the similar interface and workflow it shares with ACT!. “GoldMine did not offer the breadth of benefits we saw in Sage SalesLogix. When I looked at Sage SalesLogix, it blew me away! It was affordable, intuitive, and provided us with exactly what we were looking for,” explains Cleary.

### 30-Day Implementation, Integrating With Existing Systems

With his selection made, the next hurdle was the new school season rapidly approaching. Cleary wanted to implement Sage SalesLogix quickly so his sales team could take full advantage of its new CRM solution. “Our Sage Software business partner implemented Sage SalesLogix and integrated it with our existing proposal generation software and our QuickBooks accounting software within 30 days—less than 130 total hours—and with plenty of time before the school season began,” says Cleary.

**Customer:**

**Winged Victory USA**

**Industry:**

Educational Tours

**Location:**

Portsmouth, New Hampshire

**Number of Locations:**

Worldwide

**Number of Employees:**

Total of Seven  
(Three USA / 4 Visit Canada)

**System:**

**Sage SalesLogix**

- Sage SalesLogix KnowledgeSync

**CHALLENGE**

Winged Victory needed an affordable and easy-to-use CRM solution to streamline its sales processes.

**SOLUTION**

Sage SalesLogix integrated with Winged Victory’s existing proposal generation software and its QuickBooks accounting solution, allowing sales to view complete customer information within Sage SalesLogix.

**RESULTS**

With Sage SalesLogix, Winged Victory has been able to efficiently track customer information and follow up with prospects, thus increasing sales by more than 76 percent.

**Streamlining Sales Processes**

Now, Cleary's sales team can create automated proposals within the Sage SalesLogix opportunities tab. What used to take three people and many hours, now takes only one person and a matter of minutes. "Our sales process is much smoother. With Sage SalesLogix, we have increased our customer and account visibility. We can create reports in minutes, which allows us greater insight into our business," states Cleary.

Integrating Sage SalesLogix with QuickBooks provides Winged Victory with a view of updated financial information on customers each day within the account record in Sage SalesLogix. "The attachments tab contains all financial information pertaining to the sale, such as copies of checks, credit card authorizations, and more. Previously, we had to rely on folders with up to 300 student checks in each for just one trip! With Sage SalesLogix, all of the information is right there. It is just beautiful," says Cleary.

**Sales Increase by 76 Percent**

Since the implementation, Winged Victory has also added Sage SalesLogix KnowledgeSync so the sales team receives automatic notifications about the status of leads. When prospects enter their contact information in Winged Victory's Web site, a record is created in Sage SalesLogix that alerts the sales team to follow up with those leads. "Prior to Sage SalesLogix, we were not able to keep up with our leads, but now with KnowledgeSync we are alerted when a customer requests information from our Web site. Our sales team is able to follow up immediately, and not a single prospect slips away," states Cleary.

Winged Victory USA is continuing to realize the benefits of it's new sales process. "Our sales have increased 76 percent compared to the same period last year." Cleary continues, "Sage SalesLogix is certainly a big part of our success."

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