



# SalesLOGIX<sup>®</sup>

## Success Story

### SalesLogix - Successful integration with Sage Line 200

#### KEY ACHIEVEMENTS

- Full implementation lasted only two weeks.
- SalesLogix provided a centralised resource which gives everyone in the company a single view of a customer.
- Successfully integrated with Sage Line 200
- More focused marketing campaign activity
- New methods of customer contact created.

#### Customer Profile

- Version One is a provider of third party software solutions.
- Version One distributes their products via a network of over 200 resellers throughout the world.

**With a typical payback of just three months, Version One's products are in great demand. As one of the fastest growing software houses in the UK, exceeding 50% growth p.a. over the last five years, the company forecasts that growth will continue at the same high rate. Version One specialise in document management and imaging solutions that are seamlessly integrated into all the major accounting, manufacturing and ERP systems.**

**The company has a portfolio of products including document image processing (DbArchive), white paper printing (DbForm) and electronic document delivery (DbFax and DbMail). Version One distributes their products via a network of over 200 resellers throughout the world.**

#### The Challenge

To cope with this continual expansion and growing


customer base and new demands from the business, the company needed to take a fresh look at their CRM systems. Marketing Manager, Phillippa Layton explained, "We used ACT! for many years, as our basic contact management application. It suited our needs perfectly when we were a smaller company, as it enabled us to target customers, create groups, log callbacks and create appointments.

However, as the company grew, we needed increased functionality, such as the ability to handle multiple contacts per account. We also needed detailed reporting, forecasting and opportunity management functionality for the sales team, as well as the ability to support a sophisticated marketing strategy."

#### The Solution

Version One evaluated a number of products and SalesLogix fitted the bill perfectly.

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Phillippa Layton explained, "SalesLogix has the simple look and feel of ACT! with much more functionality and provides us with the flexibility we need - both now and for the future."

Version One already had a good working relationship with Onsite Marketing Solutions, their chosen ACT! and SalesLogix business partner. Onsite worked closely with Version One to ensure that they had all the consultancy, functionality, scripting and training they needed. The data migration from ACT! to SalesLogix was straightforward. Phillippa remarked, "It's a natural upgrade path. We planned everything in detail with Onsite which meant the implementation and training went like clockwork and only took two weeks." The implementation of SalesLogix was in two phases, the initial stage being the implementation into Version One's sales, marketing and administration departments. Once this was in place and running smoothly, it was extended into the support department with SupportLogix. This means that everyone is working from a centralised knowledge base and accessing the same data. SalesLogix has improved internal working practices and streamlined processes.

### **The Benefits**

It's great having a centralised knowledge base. Phillippa says, "Sales and marketing are now working more closely because they can really see how their roles compliment each other and we have a closer relationship with our customers." Sales Manager, Les Richardson added, "I wanted something that simply enabled me to know who had spoken to whom and about what. I also needed to be able to see the sales pipeline from cold sales leads to sales. I am

exceptionally happy with the forecasting and reporting tools, as I can analysis the potential, lost or won sales by Account Manager and by period." Version One's marketing department use SalesLogix to compile contact lists of customers, resellers and even the press, as well as planning campaigns. The administration department use it as a quick and easy way to contact customers, chase bills or check contact information.

It is easy to customise the SalesLogix screens to suit the specific needs of a department or individual. Version One has built their own functionality. Phillippa says, "We can see immediately which of our software modules an organisation is using and therefore can identify other modules that a customer could benefit from. We have customer alerts, which reveal where there is an outstanding support issue. This means we can deal with the issue immediately before proceeding with any further communication to that customer. We can adapt the application to meet any new requirements throughout the business as we continue to grow and develop."

Version One has seen a return on their investment already. Phillippa says, "With SalesLogix we can track the success of a particular campaign or mailing. All our campaign responses are totally visible, so we can see at a glance what is working and what isn't, which saves us time and money. We are using e-commerce based marketing much more, which is very easy to manage with SalesLogix. I believe it has helped us to improve our marketing strategy.

### **The Future**

Our next step is to use the

processes in SalesLogix to automate confirmation letters for seminar attendees and web based literature requests, which will make us even more efficient"

To address the planned 50% growth a year, it was important that any CRM system the company adopted would be able to cope. Phillippa concluded, "SalesLogix is a scalable product which will evolve with us from an SME software house to a much larger organisation. We are currently implementing a full ERP system, which will completely integrate our front and back office applications. As our own DbArchive software also integrates tightly with SalesLogix, electronic images of all our quotations, sales invoices, purchase invoices, PoDs, etc. are automatically attached to the appropriate accounts, and can be viewed by any authorised person with just a click of a mouse. With SalesLogix we have the foundations in place to turn company targets into achievements."

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