

# SalesLOGIX<sup>®</sup>

## Success Story

### When salespeople demand, SalesLogix delivers

"SalesLogix gives us the power to develop applications that support all of our vital business processes"



#### Key Achievements

- Significant customisation required to meet the company's requirements for a CRM system
- "Intelligence Stores" developed using SalesLogix to hold key information on top executives at targeted companies and staff interaction with them
- "Sales Library" created for approved collateral to ensure field staff are using current sales literature

#### Customer Profile

- Industry: IT sales training
- Offers sales intelligence, corporate solutions broking, client education, consultancy, recruitment and event management
- Microsoft Windows NT network
- Information from field and office staff drawn together in a central location using SalesLogix

**Youd Andrews had a problem. Despite possessing high-value sales intelligence and a bulging contact book, it had no effective way of leveraging the information. After deploying SalesLogix, Youd Andrews has built a central repository for all of its mission-critical information, ensuring that the data it passes to its clients is as commercially profitable as possible.**

#### Knowledge is power

Youd Andrews ([www.youd-andrews.co.uk](http://www.youd-andrews.co.uk)) offers sales intelligence, corporate solutions broking, client education, consultancy, recruitment and event management. The company gives its IT company clients a unique insight into important sales opportunities, in other words, what the end user customers want from IT solutions and why.

The company employs former senior executives from major corporations with the skills, and, critically, the contact book to develop relationships with executives with an interest in purchasing solutions from one of the company's clients. And, because the people targeted are usually involved in IT purchasing, Youd Andrews' clients are guaranteed a profitable audience.

#### Valuable

Despite its success, Youd Andrews faced a major challenge. Joint managing partner, Don Andrews, explained: "With executives operating as networkers in the field and in our offices, information was constantly flooding in. But, we didn't have time to ensure it was stored in a centrally, universally accessible location." This exposed the company to potential embarrassment. For example, it was conceivable that many Youd Andrews' staff could have approached the same customer contact concurrently. With information held in different 'pockets' around the company, there was no way of tracking who had contacted who and when.

Realising that it needed to increase the value of business information, it decided to develop a system for storing it centrally. It had already established a Microsoft Windows NT network in preparation for the right solution. The next task was to make the information stored in disparate databases, paper notes or memorised by staff, open to everyone.

As former developers of sales force automation software, Youd Andrews had very specific requirements for its chosen solution.

Yet, despite a wide search, nothing suitable was found. "Few companies seemed to grasp what we were looking for, never mind offer a solution," Andrews explained. The company evaluated various database and Customer Relationship Management solutions, however, none seemed to meet the company's requirements. Andrews contacted a Sage CRM Business Partner to develop a customised SalesLogix solution.

"The Business Partner delivered the expertise and partnership skills required to realise our business ambitions," added Andrews. "SalesLogix fitted the bill perfectly." I was impressed with the flexibility of the solution. SalesLogix offered an integrated, yet scalable way of managing all of its customer intelligence in one central location.

#### **Powerful**

Innovation is a key tenet of Youd Andrews' business and SalesLogix is critical to its ability to continue to enhance its offerings. The company has created a series of powerful intelligence stores and SalesLogix underpins all of its business activities.

Youd Andrews uses SalesLogix to record the information it holds on the senior contacts at targeted organisations. "SalesLogix provides powerful tools that simplify the complex and delicate process of identifying our clients' target audience. We know everything there is to know about our clients' potential customers, their interests, what kind of IT solutions they want and what is inappropriate – all thanks to SalesLogix. The solution enables us to deliver accurate and valuable information to our own clients fast and effectively," said Don Andrews.

The company also uses SalesLogix for other activities. For example, it manages the activities relating to Corporate Events, such as executive golfing tournaments. And it is a key enabler of Youd Andrews' executive recruitment strategy. From both the



candidate and the company's perspective, the Interact Commerce solution enables Youd Andrews to record information about a potential executive recruit, or a client opportunity. The information is stored in a central location which everyone can access and allows the company to qualify candidates and recruit senior people much faster.

Youd Andrews also created a special 'Associations' database of its staff. This is used to store details about the company's networkers and their relationships with important executives. SalesLogix also provides a comprehensive note history of conversations and meetings with targeted executives. Youd Andrews has developed a 'Sales Library' of approved collateral to ensure that its field staff are using current sales literature. Finally, the company developed an 'Attachments' application within SalesLogix to manage and index correspondence by staff member or networker.

"SalesLogix gives us the power to develop applications that support all of our vital business processes. In just a few clicks, I can build impressive databases that are ideally suited to

our unique requirements," Andrews said.

The solution provides the flexibility for Youd Andrews to develop new services. So while the core functionality and databases remain constant, the solution also provides the company with a reusable structure that it can re-deploy into other business areas. "All I need to do is quickly set-up a new window for the latest business area and then change the tabs in SalesLogix to provide the information we need," explained Andrews.

#### **Productivity improvements, improved information sharing**

With the help of SalesLogix, Don Andrews and his company have dramatically improved productivity, ensuring information is shared faster and that there is no duplication of effort – because everyone is aware of their colleagues' activities, there is no danger of contacting the same executive more than once.

"Our clients expect us to deliver the most accurate, up-to-date and valuable information possible. SalesLogix sees to it that we meet and exceed all of these requirements," he concluded.