

CUSTOMER SUCCESS



ITG Maximizes Technology With SageCRM

“GoldMine Sales & Marketing was a decent product. But there’s no way it could take us to the next level of sophistication for growing our business.”

Mark Severance, director of sales and marketing at Information Technology Group, Inc. (ITG) in Simi Valley, California, is an expert in helping other companies improve efficiency through technology. He therefore found it frustrating to have unresolved efficiency problems in-house.

“It was hard to get information out of GoldMine,” Severance explains. “This limited our reporting abilities. Poised for a big leap forward, our company needed a more robust tool that our consultants could use whether they were in the office or not.”

Selecting SageCRM was a “No-Brainer”

ITG considered several upgrade possibilities, including Microsoft CRM and NetSuite CRM. “Once we saw SageCRM, our decision became a no-brainer,” says Severance. “It was clear that SageCRM surpassed the competition in terms of features, user-friendliness and web accessibility.”

SageCRM is an easy-to-use, fast-to-deploy CRM solution for better business management. It integrates field sales, internal sales, customer care and marketing information for effortless information exchange throughout an enterprise.

ITG implemented SageCRM in late 2005 to manage all its internal sales and marketing activities. It uses the system to store companies, contacts and all the related activities, opportunities, proposals, and even notes of all phone conversations with clients. Employee schedules are shared as well, making it easier to set up meetings and increase visibility among team members.

Terrific Customer Service and Lead Tracking

“If a customer calls for technical support, we document who they spoke with, what the error messages were, and how long it took to get their issue resolved,” explains Severance. “Not only do we have a detailed historical record of service incidents, but we can also analyze how well we are taking care of our clients’ needs.”

Similarly, ITG uses SageCRM to manage prospect information, including appointments, phone calls, emails, faxes, when literature was sent and follow-up efforts. “With SageCRM, we have a

Customer:

Information Technology Group, Inc.

Industry:

IT consulting firm

Location:

Simi Valley, California

Number of Locations: Two

Number of Employees: 28

System:

SageCRM

CHALLENGE

GoldMine Sales & Marketing could not provide adequate reporting functions or remote access to keep up with busy consulting group’s growth.

SOLUTION

SageCRM delivers full-featured tracking of customer and prospect data, whether consultants are in office or with clients.

RESULTS

SageCRM has cut reporting time in half; sales efficiency went up by 10 percent; sales have risen 15 percent thanks to better information.

good idea of where each prospect stands in the sales pipeline,” says Severance. “We can estimate the number of accounts that might be closing for the month, and assess opportunities that may be opening up soon.”

Rapid Reporting

“We really like the reporting capabilities offered by SageCRM,” Severance notes. “We can make modifications to data quickly, and get dynamic reports immediately, rather than relying on manual updates as before.

“This makes it easier for us to offer up-to-date information to our principals. I’d say that it now takes us half as long to prepare a pipeline report compared to when we were on GoldMine.”

Remote Access

ITG serves most of Southern California through two locations, and also has a consultant in Arizona. This means that employees are often away from the main office. Previously, they had to phone in changes to the database, or wait until they returned to their desk to update information.

Fortunately, SageCRM is a web-based system, offering access from any Internet connection. “Now our people are suddenly much more efficient,” Severance says. “Their ability to focus on the task at hand and provide superior customer care has been greatly enhanced by accessing SageCRM through the Internet.”

Has SageCRM allowed ITG to turn more prospects into customers?

“While many factors contribute to effectively turning prospects into customers, SageCRM gives us great potential for being more successful. It gives us the capability to know more about our customers and prospects, enabling us to respond quickly and serve them much better than our competitors. This fact alone has the potential to increase sales by as much as 15 percent,” Severance replies.

“SageCRM is a fantastic product,” he continues. “The more we use it, the more we appreciate it. We see it as a critical component of our success for years to come.”

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