

Sage CRM | Customer Success Story

Challenge

Vendere Partners had been using a CRM tool that provided limited visibility within company on customer activity. This hindered the company from implementing its own processes and systems.

Solution

SageCRM.com was implemented throughout the company and enabled the company to leverage and articulate its unique strengths, helping its clients sell more effectively.

Results

SageCRM.com has opened up communications within the organization; distributing of leads and opportunities to territories more effectively and yielding large ROI.

CUSTOMER:

Vendere Partners

INDUSTRY:

Business Services

LOCATION:

United States

SOLUTION:

SageCRM.com

Vendere Partners Schedules Appointment for Continued Success With SageCRM.com

Dallas-based Vendere Partners schedules appointments for its client salespeople to pitch technology solutions to qualified prospects. Vendere not only helps its clients sell more effectively, it also saves clients the overhead of operating their own telemarketing departments.

However, Vendere was having challenges until it scheduled its own appointment with SageCRM.com - the innovative, hosted CRM resource from Sage Software. With true web and wireless access, a wide variety of features, and rapid deployment options, SageCRM.com eliminated all the up-front costs.

A Call for Visibility and Control

Vendere started with Jim Alkire, president, and Sean O'Neil, vice president, making cold calls utilizing various CRM tools, which clients provided access to, and a low-end solution. Within six months, Vendere needed a solution of its own. "As soon as we added more people, we needed more visibility and control over their daily activity," says Sean O'Neil. "There was no way of knowing what employees were working on without sitting down in a one-on-one discussion. We had no reporting or metrics by which to grow our business."

Although Vendere found ways to work around the limitations, the company struggled with its first several client engagements. "When I spoke with the Sage Software business partner about what our needs were, they recommended SageCRM.com," recalls O'Neil.

SageCRM.com is truly Vendere's business system. If a client does not have a target list, Vendere will get them one, and create marketing campaigns for inside salespeople to call. O'Neil manages and tracks inside sales rep activity, and monitors opportunities. It's how the company pays commission and charges customers.

No Direct Assistance Needed for Easy Rollout and Customization

Ninety-five percent of Vendere's business is "inside sales" outsourcing, with "outside sales" at five percent. SageCRM.com had to work for both. "We rolled it out with a small user group - me. First, I did an outside sales test study cold calling to get our own business. There were several levels of customization, which took about a month.

I mapped SageCRM.com to combine targeted account selling and solution selling for our direct salespeople, and developed a process for better pipeline management. It was so easy, I did it without having to call our business partner.” Next, O’Neil developed an inside sales process running a pipeline mapped to SageCRM.com. Prospect managers use it for lead generation, qualification, and track progress in scheduling appointments for client salespeople. “Instead of our pipeline going from ‘Opportunity’ at 10 percent to ‘Close’ at 100 percent, we start with ‘Leave Voicemail,’ and end with ‘Schedule an Appointment’.”

Reports Help Campaigns Ring True

With SageCRM.com, Vendere has a lot of visibility and control. It can provide its customers with up-to-the-minute, real-time customized reports around its process. Vendere can track progressive campaigns, see which work, which do not, and why. Dynamic sales support logic helps Vendere to utilize and better manage prospect reaction for faster, more effective scripting changes.

“We record conversations in our telephony system, and track them in SageCRM.com. Clients can see them in line items. In fact, one of our clients noticed that a prospect had showed no interest because the prospect was looking for an industry specific solution. Our client acknowledged that unbeknown to us, they had that industry-specific solution in one of their other offices. So now, our client is targeting that prospect with industry-specific solution marketing material.”

Vendere also utilizes SageCRM.com for research and analysis of target markets.

When prospect managers call, prospects uninterested are asked what software they use. The identified software is tracked in SageCRM.com. Months later, Vendere clients can then put together campaigns targeted at those specific software users.

ROI Is Off the Hook

“SageCRM.com has exactly what we need. The others only deliver about 50 percent. Everything else you have to do manually, which wastes time like excessive ‘clicks.’ We compared another leading CRM tool that takes 11 clicks to do what it takes six clicks with SageCRM.com. It’s easy from an employee, a management, an administrative, and a utility perspective.”

SageCRM.com also pays off from an investment perspective. Vendere pays a set annual license fee per user. “Recently, six licensed users on a four-month pilot program resulted in two additional months of contract, and the client looking to take the team from six to 24 for the next year. That’s a 10,000 percent ROI. That’s just one group,” says O’Neil with great satisfaction. Since the initial deployment, the business partner has been planning an onsite installation of Sage CRM.com. While the hosted version fits Vendere’s early stages of growth, an onsite solution will pay off once a critical mass of employees come on board. SageCRM.com has a unique licensing model that enables Vendere to apply some of the hosting fees investment to the onsite solution, thus allowing the business partner to assist Vendere with additional customizations and integration with the phone system.

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Sean O’Neil,
Vice President,
Vendere Partners

About Sage CRM

Award-winning Sage CRM delivers full suite CRM (comprising sales, marketing and customer service automation) and offers a broad range of functionality with a low TCO to small and mid-sized organisations globally. Sage CRM equips sales, marketing and customer service teams with the tools they need to find new customers, close sales faster and build lasting, more profitable relationships across all channels. Regardless of how, when or where customers, partners and prospects choose to interact with your business, Sage CRM provides a decisive advantage by delivering a comprehensive, easy-to-use system to successfully manage these relationships.

Thanks to its ERP integration capabilities, the Sage CRM front-office is powered by data from the back-office to give sales, marketing, customer service and other front-office staff a true 360 degree view of customers across front- and back-office functions, differentiating it from many other CRM solutions in the market today.

The Sage Difference

- The leading supplier of SMB business applications in the world*
- The leading supplier of CRM solutions to SMB organisations
- Over 6.1 million customers
- Over 13,100 employees
- Over 30,000 Sage-certified partners specialising in business applications
- Direct presence in 24 countries
- Relationships with over 40,000 accountancy practices
- 28 years experience

*Source: AMR Research, 2009, The Global Enterprise Application Market

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