

Sage SalesLogix | Customer Success



Challenge

Disparate systems had created silos of information and reduced the ability to provide the highest quality customer service.

Solution

Aspyra implemented an integrated Sage SalesLogix and Sage MAS 90 ERP solution to connect and improve sales, support, finance, and product development functions.

Results

Streamlined and integrated business processes in sales, support, finance, and product development have resulted in smoother internal communications and increased customer satisfaction.

Customer

Aspyra, Inc.

Industry

Software Manufacturer

Location

Calabasas, California

Number of Locations

Three

Number of Employees

125

System

Sage SalesLogix
Sage MAS 90

Aspyra Connects Key Areas of Business to Improve Customer Satisfaction

Like so many fast-moving companies, Aspyra found itself running a hodgepodge of applications, which functioned adequately but produced silos of information. The company had several sales prospecting products, a dated helpdesk system, plus the usual gamut of spreadsheets, folders, and documents—in essence, a lot of redundant and inconsistent information.

Aspyra, a global provider of clinical and diagnostic information solutions for the healthcare industry, wanted a CRM solution that would make it easier to keep customers happy, while improving internal effectiveness.

Selecting the Optimal Solution

Aspyra launched its CRM initiative by compiling a comprehensive requirements document. Among the primary requirements were: 1) to improve sales processes and give management real-time insight into the company's pipeline; 2) to empower the customer support staff with a robust tool that allowed visibility into customer history; 3) to integrate critical sales, support, finance, and product development processes.

Aspyra assessed several vendors, including Sage, Pivotal, Maximizer, and SalesForce.com. Aspyra's Chief Operations Officer, James Helms, says that after a thorough product evaluation, "We quickly settled on Sage SalesLogix because of breadth of functionality."

Aspyra also put significant effort into choosing a business partner*. Helms explains, "We were as diligent in picking a reseller as we were in picking a product. I believe having a partner that will help you through implementation and provide follow-up support is essential."

Starting With Sales

Adhering to a phased approach, Aspyra first installed Sage SalesLogix Sales and integrated it with the company's existing Sage MAS 90 ERP system. This instantly gave the sales organization insight into data such as customers' current products and allowed them to enter orders directly into Sage MAS 90 for seamless, error-free invoicing.

Aspyra also converted its valuable legacy data (prospecting, contact/account info, helpdesk tickets, and more) directly into Sage SalesLogix. After only a few training sessions, the sales team picked up where they'd left off, without losing time updating records or fumbling with new functionality. Even with an entirely remote sales organization, Helms reports that the first phase "went without a hitch."

Enhancing Customer Support

Phase two included implementing Sage SalesLogix Support and integrating it with Sage MAS 90 to enable visibility into customers' products, maintenance contracts, service level agreements, and more. Helms stresses the value of this connection. "I don't know how we'd operate without this. Our whole business revolves around supporting the things we sell. If we don't have that visibility, we're paralyzed."

Aspyra also defined a set of business conditions that would trigger automatic alerts, particularly in time-sensitive situations such as when support tickets or bug fixes are due. Enabled by Sage KnowledgeSync, the auto-alerts facilitate teamwork across the organization, helping teams meet goals on time and deliver proactive service.

Lastly, Aspyra enabled Sage SalesLogix Defect Management. This component delivers real-time product development info to support reps, so that they can communicate accurate, timely updates to customers.

Reaping the Rewards

Aspyra is experiencing new efficiencies across the organization. The sales implementation not only streamlined Aspyra's prospecting processes, but also led to the development of a formal sales process. Sales staff can now easily report detailed, up-to-the-minute account status and management can accurately predict revenues.

"We customized the tabs to slice and dice our info, to quickly look at what's forecasted near-term and what's on the horizon. Senior management depends on that window into the pipeline," says Helms. "We look at that information every day."

Note: Customer is a participant in the Sage Customer Reference Program and may be eligible for participation-based incentives.

** Business Partners are third-party vendors. Sage and its affiliates are in no way liable or responsible for claims made related to the services provided by third-party vendors.*

About Sage SalesLogix

Sage SalesLogix offers a complete view of customer interactions across departments—providing information and insights for better planning, managing, and forecasting. Your teams will have the tools to increase sales, reach more profitable customers, enhance the customer experience, and anticipate customer needs. Sage SalesLogix offers flexible access, deployment, and payment options to address business requirements.

About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs 4,000 people and supports 3.1 million small and mid-sized business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,100 people and supports 6.2 million customers worldwide.

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– James Helms
Chief Operations Officer
Aspyra, Inc.

Another key benefit is the company's newfound ability to publish global changes without accessing individual desktops. Helms comments, "It's fast and easy to make changes. Views can be changed centrally, then pushed out to users."

In the Support and Development departments, day-to-day processes move more fluidly than ever. Support leverages the Advanced Speed Search feature to decrease resolution times. Reps can quickly access past incidents to see if a colleague previously solved an issue, as well as search company manuals and other reference documents. Although Aspyra hasn't issued a formal poll, recent conversations with customers indicate an increase in satisfaction.

Looking ahead, Aspyra plans to increase its Sage SalesLogix licenses, roll out the integrated solution to all locations, launch a customer web portal, and potentially implement Sage SalesLogix Marketing. In concert with its reseller and the Sage SalesLogix support organization, which Helms describes as "timely and helpful," Aspyra is poised for continuing success and customer satisfaction.