

CUSTOMER SUCCESS



Sage SalesLogix Is a Beneficial CRM Solution for The Benefit Companies

Since it first opened its Milwaukee office more than 30 years ago, The Benefit Companies, Inc. has been assisting employers throughout the Midwest in a variety of areas, including employee benefits; property, casualty, and individual insurance; financial and retirement planning; and human resources. The Benefit Companies consists of eight related divisions providing a variety of traditional and innovative employer services, with a focus on cost-effective, value-added solutions. To help it communicate more effectively with its customers and prospects across all of its business units, The Benefit Companies turns to Sage SalesLogix.

Find a Flexible and Scalable Solution

The Benefit Companies adopted Sage SalesLogix nearly a decade ago. Prior to this, the company was using ACT! by Sage. “Upgrading from ACT! to Sage SalesLogix was a natural transition and just made sense,” recalls Bill Sells, manager of technologies for The Benefit Companies. “We were growing quickly and adding many new users. We needed a powerful CRM (Customer Relationship Management) solution with a centralized database that could sustain our growth track and support our changing and expanding business.”

Analyze Data in Meaningful Ways

The Benefit Companies uses the comprehensive, interactive SalesLogix Visual Analyzer tool to monitor its leads and opportunities. Sage SalesLogix Visual Analyzer displays a graphical dashboard of key performance indicators selected by The Benefit Companies. “It’s a visual display that shows us the number of prospects, the number of closed, won, and lost opportunities, and what stage the opportunities are in,” explains Sells. “We can drill down for the details behind the display. Sage SalesLogix is a powerful tool that both management and our representatives use to focus our sales efforts.”

Sells has created several Sage SalesLogix Visual Analyzer dashboard views to suit the needs of different job roles within the company. “Each executive wants to see a certain subset of information, and we can tailor the view to show each individual what they want,” he says.

The company’s sales managers rely on a dashboard view that shows the sales activity for the entire company, and allows them to narrow the view to each specific company and then further narrow the results to an individual sales representative.

Customer:

The Benefit Companies, Inc.

Industry:

Business Services

Location:

Milwaukee, Wisconsin

Number of Locations: 3

Number of Employees: 100

Number of Users: 80

System:

Sage SalesLogix

Sage SalesLogix Visual Analyzer

Add-On Solution:

Swiftpage

CHALLENGE

The Benefit Companies was using contact management software but its growth track demanded a more robust solution capable of handling a high user count.

SOLUTION

Sage SalesLogix and Sage SalesLogix Visual Analyzer provide the solution The Benefit Companies relies on to track leads, launch campaigns, and close more deals.

RESULTS

Customization capabilities and strong security help the company comply with industry regulations. Defined workflows ensure consistency across 8 divisions. The company has increased its ability to cross-sell services to existing clients.

With over 50 reports available out-of-the-box, and a multitude of custom reporting options available using Crystal Reports, Sells can produce the precise reports his team needs. "We can get at any data in the database and combine it in meaningful ways," Sells explains.

Ensure Consistency With Defined Workflows

The Benefit Companies ensures that it operates with consistency across its divisions by utilizing the workflow function found in Sage SalesLogix. By establishing a sales process workflow, management can define stages and steps and assign objectives, activities, results, and a close probability to each opportunity. Each step in the workflow can include activities such as literature requests, e-mail contacts, or proposals. "We can have a slightly different workflow for each division, as appropriate, while still maintaining a high level of consistency corporate-wide so we are more productive," Sells says. "And the workflows ensure that the proper steps are followed."

Launch and Manage Successful Campaigns

The Benefit Companies uses the campaign management functionality within Sage SalesLogix to design and launch its campaigns and then monitor them for effectiveness. Aided by an e-mail marketing product called Swiftpage, The company is able to track the open, forward, and click through events of every e-mail message sent. Swiftpage then brings that data into Sage SalesLogix in the form of a call list sorted by the recipient's interest as gauged by the number of open, forward, and click through events. "It helps our telemarketing staff focus their energy on the most likely candidates," Sells says.

Track New Leads

The company buys lists of prospects and imports those lists into a separate Lead database section in Sage SalesLogix, keeping the prospects separate from its customers in the database. The Benefit Companies' telemarketing team then begins its work, speaking with the prospects and asking questions to determine whether the lead should be promoted to an opportunity. "It's very efficient to keep the leads separate from our customer data," says Sells. "It helps ensure the integrity of our database."

"Sage SalesLogix is a powerful tool that both management and our representatives use to focus our sales efforts. It is an integral and important part of our business."

Safeguard Sensitive Data

As an insurance provider, The Benefit Companies is required to track certain information to remain in compliance with state agencies. Additional screens and data elements were added to track the unique information, and field-level security allows the company to hide sensitive data from employees who do not require access to it.

"We've also configured the security in Sage SalesLogix to limit individuals' access to only the divisions they are involved in," says Sells. "It's a best business practice to give people access to only the data they need to do their jobs."

Reap the Benefits

Sells attributes the company's ability to generate new sales opportunities from within its client base to Sage SalesLogix. "Across our eight divisions there is a lot of customer crossover. Because our customer data is available to everyone, we can identify current customers who could benefit from the services of another division and then market those services to them. This is significant as it represents a large percentage of our new sales."

For nearly a decade, The Benefits Companies has been successfully using Sage SalesLogix. Sells concludes, "It is an integral and important part of our business."

If you would like to learn more about Sage SalesLogix, please visit www.sagecrmsolutions.com or call 1-800-643-6400 to speak with a representative today.



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