



CUSTOMER SUCCESS STORY

CUSTOMER

Mediware Information Systems, Inc.

CORPORATE PROFILE

Headquarters

Lenexa, Kansas

Type of Business

Software provider

Number of Employees

200

APPLICATION

Software

ACT! Premium for Workgroups

Add-on Products

Topline Dash Manager

Handheld Contact

Number of ACT! Users

41

Mediware Information Systems Revitalizes its Sales Organization with ACT! by Sage Premium for Workgroups

Mediware Information Systems has successfully provided clinical information systems to the health care industry for 25 years. Recently, however, as the company grew to support more than 1100 customers, three separate divisions, and a remote sales force, they began to experience challenges in managing customer information.

Mediware faced the typical challenges that stem from sporadically using contact management, specifically ACT! 2004 (6.0), in combination with spreadsheets and handwritten notes. The salespeople who took advantage of ACT! didn't consistently synchronize from the road, which caused delays and inaccuracies in the company's sales pipeline figures. Those not using ACT! couldn't be held accountable for reliable opportunity management at all.

Sales management had difficulties quantifying sales reps' daily activities and the status of accounts. And, when the CFO wanted sales and opportunity reports from each division, she'd receive disparate documents, all tracking slightly different data points. She couldn't effectively compare side-by-side performance. Ready for a change, Mediware examined the leading contact management



solutions. Based on their experience with ACT!, the company decided to transition to ACT! Premium for Workgroups. By choosing a solution specifically designed to support workgroups and sales teams, Mediware had made a crucial first step in closing disconnects between sales, sales management, divisions, and executive management.

A Non-Technical Employee Successfully Customizes ACT!

Mediware's sales administrator, Christine Gofron, was tasked with configuring and implementing ACT! Premium for Workgroups throughout the organization. Although adept with the front-ends of standard business applications, she had

CHALLENGE

With more than 1100 customers, three separate divisions, and a remote sales force, Mediware was beginning to lose its grip on customer data, cross-divisional communications, and sales accountability.

SOLUTION

Establish centralized control of customer data, salespeople, and processes by implementing ACT! Premium for Workgroups, plus add-on solutions Handheld Contact and Topline Dash Manager.

RESULTS

Dramatic improvements in sales accountability, reporting, opportunity management, and cross-divisional communication, including 60 new cross-divisional sales in less than five months.



Your business in mind.

"We wanted to make it easier for any sales rep from any division to cross-sell products. ACT! provided the perfect framework to build the relational sales processes and reporting procedures. Our entire team is more productive as a result."

— Christine Gofron
Sales Administrator, Mediware

ABOUT SAGE SOFTWARE

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never attempted to globally administer a contact management solution before!

A true testament to the usability of ACT!, she began to customize the system without any IT background whatsoever. Within three months, she'd not only customized the solution to suit Mediware's needs, she had also rolled it out to all users. What's more, she delivered several sessions of live e-training to the entire staff using the company's Web conferencing tool.

"When I found out I could administer the whole thing myself, my job satisfaction increased dramatically," explained Gofron. "I taught myself data import and custom layout, then wrote and presented a training manual for our staff. I now have two operational databases on the server – one for our sales team and another for testing new customizations before I roll them out to everyone."

As an example, she customized sales opportunity management and pipeline features, based on the company's strategic selling process. With the database structured to support sales processes, each division began tracking identical data points. Without any additional effort, the CFO's disparate reporting problem was solved. She now had one report from which to compare all three divisions without any guesswork or data manipulation.

Marketing also took advantage of the new solution, using ACT! Premium for Workgroups to generate e-mail campaigns to more than 7000 recipients and to automatically flag each recipient within the respective contact record.

Increasing Accountability and Cross-Divisional Sales

Mediware leverages ACT! Premium for Workgroups to enforce sales accountability, especially for mobile reps who formerly had to login at the end of the day to update account data. Now, sales reps can enter

updates from the field using Handheld Contact, an add-on solution that enables access to key contact and customer data directly from a BlackBerry® device.

Mediware takes advantage of another add-on solution, Topline Dash Manager, to track customer calls and meetings for each sales representative. This capability has not only increased sales accountability, but has produced more accurate activity reporting and performance metrics. The sales staff also frequently uses the ACT! Export to Excel® feature to create their own spreadsheets of customer and prospect data.

Mediware's salespeople now have a clear understanding of exactly what information management expects to see for each account. Using the customized ACT! Premium for Workgroups interface, they enter data under custom tabs such as Opportunity Details, Closing Plan, Hospital Specifics, and Demo Detail, as well as individual tabs for each division. They also share a history file of difficult selling situations, so that they can refer to other reps' notes for best practices and advice on closing challenging deals.

Mediware's strategic use of ACT! Premium for Workgroups has enabled the company to maximize cross-divisional sales opportunities. Because employees from the company's Medication Management, Blood Management, and Perioperative Management divisions now work within one central database, they can see which representative is in cycle with a particular hospital and make a plan to work together, rather than stepping on each other's toes. Within five months of upgrading to ACT! Premium for Workgroups, Mediware recorded 60 cross-divisional sales.

"We wanted to make it easier for any sales rep from any division to cross-sell products," said Gofron. "ACT! provided the perfect framework to build the relational sales processes and reporting procedures. Our entire team is more productive as a result."