

Sage SalesLogix | Customer Success



Challenge

The company's previous CRM software lacked the robust campaign and lead tracking functionality Equisys needed to be effective.

Solution

Sage SalesLogix helps automate marketing and sales tasks, ensuring every opportunity receives the attention it deserves.

Results

Automated workflow allows a lean staff to launch and track campaigns, follow up on new leads, and route promising leads to sales. Support call resolution time is now consistently 30% below the industry average.

Customer
Equisys, Inc.

Industry
Software Publisher

Location
Alpharetta, Georgia

Number of Locations
Two

Number of Employees
76

System
Sage SalesLogix

Add-on Product:
Sage KnowledgeSync

Sage SalesLogix Gives Equisys the Competitive Edge

Equisys, Inc. is a successful software publisher with offices in the United Kingdom and the United States. The company's software helps businesses create, deliver, and share electronic documents. Its flagship product, Zetafax, is installed at more than 60,000 companies around the globe. Equisys understands the importance of customer communication and the value of technology—and has selected Sage SalesLogix as its Customer Relationship Management (CRM) solution.

Equisys incorporated in the United States several years ago. Without a consistent lead source from its parent company, Equisys experienced a slump in sales. The company had been using a CRM system called Sharkware, but the software simply did not have the power or the functionality Equisys required.

Shannan Friedman, marketing manager for Equisys, explains the situation, "We had no history of our sales and prospecting activity. We had no systematic way to handle leads and ensure follow-up. We kept notes and scheduled reminders, but it wasn't enough. Smaller companies need to work smarter, putting their creative energies into revenue generating activities, not administration."

Equisys decided to invest in the robust capabilities of Sage SalesLogix to allow the company to better manage opportunities, capture sales related activities, manage marketing campaigns, and track support incidents. With the help of an experienced Sage Business Partner*, Equisys implemented Sage SalesLogix.

Automate Campaign Functions

"I am a one-woman marketing department," Friedman says, "I couldn't do what I do without Sage SalesLogix. With its automated workflow, I don't have to spend the time manually tracking each lead."

The workflow automation functionality within Sage SalesLogix allows Friedman to automate and streamline campaign management and ensures vital steps are not forgotten. In a typical campaign, a print or email marketing ad serves to drive prospects to a campaign-specific landing page on the Equisys website. Contact information entered by the prospect is captured and sent to Sage SalesLogix, where the automated campaign workflow kicks in. An acknowledgement email is sent immediately, followed by other correspondence such as a brochure or demonstration copy of the product. Decision points and conditional

requirements added to the workflow allow Equisys to deliver appropriate messages in timed succession and to keep the lead moving.

“We have automated the majority of our marketing communication tasks and are now completely paperless,” says Friedman.

Create and Execute Targeted Campaigns

Friedman makes extensive use of filters and the Groups functionality within Sage SalesLogix to send targeted marketing messages to prospects in a particular phase of the buying cycle. She uses the filters within Sage SalesLogix to identify prospects and customers with certain attributes, and then places the resulting records into a Group. “With Sage SalesLogix we are able to direct our marketing messages to specific groups of prospects and tailor our message to each group,” Friedman explains.

Turn Leads Into Sales

When a prospect turns into an opportunity, Friedman clicks a button within Sage SalesLogix to assign that lead to a sales account manager. Once the lead enters the sales process, Sage SalesLogix keeps a record of every document delivered, every email sent or received, every phone call, and every task. The result is a comprehensive history of the company’s interactions with its customers and prospects. Automated alerts are scheduled throughout the process to remind the account manager to follow up on an opportunity or to warn the sales manager if an opportunity has been idle too long.

Remain Alert

Sage KnowledgeSync is the engine behind those alerts, and Equisys utilizes it to further automate many of its other processes.

The company has configured numerous alerts that allow staff members to respond to crucial business events such as support calls in need of escalation, opportunities or activities that are falling behind schedule, or new leads recorded in Sage SalesLogix.

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.

“Sage SalesLogix is supporting our growth track. It allows us to automate rather than hire additional staff and it helps us maximize the value of every opportunity.”

– Shannan Friedman
Marketing Manager
Equisys, Inc.

Boost Customer Service Levels

The support department at Equisys also relies on Sage SalesLogix. The knowledge base within Sage SalesLogix serves as the repository for technical support questions related to Equisys products. The support staff can quickly search within reference materials such as online manuals or white papers using advanced filtering, scoring, sorting, and preview capabilities. When a resolution is found, a single click populates the service ticket with the solution. As new problems and resolutions are identified and approved, they are added to the knowledge base.

The efficiency Sage SalesLogix brings to the company’s support department has allowed the organization to shorten its call response time. “The industry standard for customer service/support call response time in our industry is 2 hours. We consistently beat that mark with our average response time of 1 hour and 23 minutes,” Friedman notes.

“Sage SalesLogix is supporting our growth track,” Friedman concludes. “It allows us to automate rather than hire additional staff and it helps us maximize the value of every opportunity.”