



CUSTOMER SUCCESS STORY

CUSTOMER

Information Technology Group, Inc.

INDUSTRY

IT consulting firm

LOCATION

Simi Valley, California

Number of Locations

Two

Number of Employees

28

SYSTEM

Sage CRM

ITG Maximizes Technology With Sage CRM

“GoldMine Sales & Marketing was a decent product. But there’s no way it could take us to the next level of sophistication for growing our business.”

Mark Severance, director of sales and marketing at Information Technology Group, Inc. (ITG) in Simi Valley, California, is an expert in helping other companies improve efficiency through technology. He therefore found it frustrating to have unresolved efficiency problems in-house.

“It was hard to get information out of GoldMine,” Severance explains. “This limited our reporting abilities. Poised for a big leap forward, our company needed a more robust tool that our consultants could use whether they were in the office or not.”

Selecting Sage CRM was a “No-Brainer”

ITG considered several upgrade possibilities, including Microsoft CRM and NetSuite CRM. “Once we saw Sage CRM, our decision became a no-brainer,” says Severance. “It was clear that Sage CRM surpassed the competition in terms of features, user-friendliness and web accessibility.”



Sage CRM is an easy-to-use, fast-to-deploy CRM solution for better business management. It integrates field sales, internal sales, customer care and marketing information for effortless information exchange throughout an enterprise.

ITG implemented Sage CRM in late 2005 to manage all its internal sales and marketing activities. It uses the system to store companies, contacts and all the related activities, opportunities, proposals, and even notes of all phone conversations with clients. Employee schedules are shared as well, making it easier to set up meetings and increase visibility among team members.

CHALLENGE

GoldMine Sales & Marketing could not provide adequate reporting functions or remote access to keep up with busy consulting group’s growth.

SOLUTION

Sage CRM delivers full-featured tracking of customer and prospect data, whether consultants are in office or with clients.

RESULTS

Sage CRM has cut reporting time in half; sales efficiency went up by 10 percent; sales have risen 15 percent thanks to better information.

"Sage CRM is a fantastic product. The more we use it, the more we appreciate it. We see it as a critical component of our success for years to come."

—Mark Severance
Director of Sales & Marketing
Information Technology Group, Inc.

ABOUT SAGE SOFTWARE

Sage Software has been responding to the needs, challenges, and dreams of small and mid-sized businesses for over 25 years. With a complete range of business management solutions and services, Sage Software helps companies improve customer relationships, reduce costs, and automate and integrate a variety of operational activities. Its solutions support the specialty needs of a broad scope of industry segments, including manufacturing, distribution, construction, real estate, nonprofit, and professional services.



Terrific Customer Service and Lead Tracking

"If a customer calls for technical support, we document who they spoke with, what the error messages were, and how long it took to get their issue resolved," explains Severance. "Not only do we have a detailed historical record of service incidents, but we can also analyze how well we are taking care of our clients' needs."

Similarly, ITG uses Sage CRM to manage prospect information, including appointments, phone calls, emails, faxes, when literature was sent and follow-up efforts. "With Sage CRM, we have a good idea of where each prospect stands in the sales pipeline," says Severance. "We can estimate the number of accounts that might be closing for the month, and assess opportunities that may be opening up soon."

Rapid Reporting

"We really like the reporting capabilities offered by Sage CRM," Severance notes. "We can make modifications to data quickly, and get dynamic reports immediately, rather than relying on manual updates as before."

"This makes it easier for us to offer up-to-date information to our principals. I'd say that it now takes us half as long to prepare a pipeline report compared to when we were on GoldMine."

Remote Access

ITG serves most of Southern California through two locations, and also has a consultant in Arizona. This means that employees are often away from the main office. Previously, they had to phone in changes to the database, or wait until they returned to their desk to update information.

Fortunately, Sage CRM is a web-based system, offering access from any Internet connection. "Now our people are suddenly much more efficient," Severance says. "Their ability to focus on the task at hand and provide superior customer care has been greatly enhanced by accessing Sage CRM through the Internet."

Has Sage CRM allowed ITG to turn more prospects into customers? "While many factors contribute to effectively turning prospects into customers, Sage CRM gives us great potential for being more successful. It gives us the capability to know more about our customers and prospects, enabling us to respond quickly and serve them much better than our competitors. This fact alone has the potential to increase sales by as much as 15 percent," Severance replies.

"Sage CRM is a fantastic product," he continues. "The more we use it, the more we appreciate it. We see it as a critical component of our success for years to come."