

SAGE CRM



CUSTOMER SUCCESS STORY

**CUSTOMER**

Louisiana Economic Development

**INDUSTRY**

Government Agency

**LOCATION**

Baton Rouge, Louisiana

**Number of Locations**

One

**Number of Employees**

90

**SYSTEM**

Sage CRM

## Louisiana Department of Economic Development Weathers the Storm With Sage CRM

In August 2005, the Louisiana Department of Economic Development (LED) was looking for a CRM system to replace GoldMine®, which they'd outgrown after more than ten years of use. In the midst of comparing solutions, hurricanes Katrina and Rita struck the Louisiana coastline.

Under normal circumstances, LED is the state agency charged with attracting new business and industry to Louisiana and providing economic development services to resident industry, small businesses, and entrepreneurs. After the hurricanes, LED was suddenly tasked with providing emergency assistance to affected businesses and their employees throughout the region.

In the months before the disaster, LED had been working with a Sage Software business partner (the company that had supported their GoldMine implementation since 1998) to identify a replacement solution. Immediately after Katrina hit, LED turned to the business partner for advice on applying CRM in a disaster-recovery situation. The partner recommended Sage CRM as the optimal technology to support both their immediate and long-term needs.



### Getting Up and Running Fast

To get started, LED downloaded a free, 30-day Sage CRM trial product. Side-by-side with their business partner, the agency defined how they would use the solution and roll it out to end-users.

Linda Regira, director of Policy and Planning for LED, said, "We didn't have time to dwell on what we were doing. We sat down with our business partner and told them what we needed Sage CRM to do and they ran with it. On the first day, they managed to train us in an hour and our users actually knew what to do. It was amazing."

The free trial experience won LED over. The agency decided to proceed with a Sage CRM implementation, but just as they were

**CHALLENGE**

Replace GoldMine® with a more robust CRM solution, while managing disaster recovery efforts for businesses struck by hurricanes Katrina and Rita

**SOLUTION**

Work with Sage Software business partner to implement Sage CRM and quickly train users to assist in disaster recovery

**RESULTS**

Successfully assisted thousands of businesses, including providing temporary housing to more than 1000 displaced workers; improved marketing and project tracking, and financial accountability



Your business in mind.

*“Based on our past experiences, LED assumed all CRM packages would be cumbersome and inflexible. That myth was quickly dispelled when we had to take a crash course on Sage CRM.”*

—Linda Regira  
Director of Policy & Planning,  
Louisiana Economic Development

## 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.



about to purchase the software, the governor of Louisiana issued a spending freeze.

As a gesture of support, Sage Software allowed LED to use Sage CRM 200 for up to 100 users free of charge for five months. Within three days of implementing the solution, LED personnel were logging critical hurricane-related data.

### Using Sage CRM to Assist Affected Businesses

LED had established both an email and a telephone hotline through which businesses could communicate their status. LED staff catalogued every email and call, and assigned follow-up tasks in Sage CRM. The agency ran reports to determine the areas in greatest need and allocate appropriate resources. Off-site employees used Web access to see real-time data and post updates from the field.

Dealing with so many different scenarios, LED took full advantage of the flexibility and ease-of-use of Sage CRM. The solution enabled management of a wide variety of relationships from LED headquarters as well as from Business Assistance Centers strategically located across the state. In the end, LED consulted on nearly 5,000 business-related issues and coordinated aid to more than 2,000 companies through assistance centers.

Regira recalled, “Based on our past experiences, LED assumed all CRM packages would be cumbersome and inflexible. That myth was quickly dispelled when we had to take a crash course on Sage CRM.”

LED successfully tracked thousands of contacts from businesses trying to get back into buildings, find employees, establish temporary housing, hire temporary workers, and more. Notably, in partnership with FEMA, LED used Sage CRM to organize temporary housing for more than 1,000 workers who wished to return to work.

At the 2006 Governor’s Conference on Economic Development, Secretary Michael Olivier was quoted as saying, “After hurricane Katrina, by getting up and running quickly with Sage CRM, we were able not only to help our displaced businesses right away, but we were also able to be accountable to the Governor about who we helped, when we helped them, and what we did for them. From a management perspective, we were quickly able to see what our businesses were asking for most often—so we knew where to focus our efforts.”

### Improving Financial Accountability with Sage CRM

Although still assisting businesses in hurricane recovery, LED is now using Sage CRM in a more traditional fashion. The agency has launched two major marketing campaigns, promoting financial incentives for setting up business in Louisiana. LED utilizes the Campaign functionality to track Leads and Opportunities as they progress toward becoming Companies (i.e. local businesses).

LED staff tracks brochure mailings and follow-up calls for campaigns in Sage CRM and uses the information to evaluate each campaign’s value. They also track hiring incentives and workforce development programs. Managing projects in Sage CRM helps LED to report regularly on the state’s development efforts to the Governor and tax payers.

Looking ahead, LED plans to integrate its proprietary incentives tracking application with Sage CRM to build company profiles reflecting direct business assistance and other opportunities provided by LED. The program will help LED identify how to best assist these businesses in the future. The organization also plans to implement Sage CRM on mobile devices, so that its staff can access and update information from tradeshow and customer meetings.