



CUSTOMER SUCCESS STORY

**CUSTOMER**

Harbor Capital Advisors, Inc.

**INDUSTRY**

Mutual fund sales and marketing

**LOCATION**

Toledo, Ohio

**Number of Locations**

Two

**Number of Employees**

76

**SYSTEM**

Sage CRM SalesLogix

## Harbor Capital Advisors Turns the Tide With Sage CRM SalesLogix

Harbor Capital Advisors (HCA) is the adviser and investment arm of a family of 12 no-load mutual funds that offer actively managed portfolios of stocks, bonds, and money market securities with combined assets of approximately \$17.2 billion.

Until recently, HCA Securities, Harbor Capital's broker dealer, had limited marketing activities, primarily with institutions. That changed last year with the creation of an expanded sales and marketing group to build new relationships with broker/dealer channels, 401k, and registered investment advisor markets.

Deb Well, newly hired as HCA Securities' Director of E-Business, took one look at the existing database and knew it needed to be replaced. Well did a comparative analysis and decided on Sage CRM SalesLogix because it could be easily customized for the unique needs of Harbor Capital and HCA Securities.

### Smooth Sailing With Sage CRM SalesLogix

"Given our multi-channel environment, I couldn't see going with anything but Sage



CRM SalesLogix," she says. "Our industry is changing at the speed of light—and only Sage CRM SalesLogix gives us the flexibility we need to compete."

Harbor Capital and HCA Securities now use Sage CRM SalesLogix to manage every aspect of their customer relations with potential mutual fund investors. Sage CRM SalesLogix stores information on every sales meeting, phone call, and e-mail, and tracks where a prospect is in the sales cycle. Sage CRM SalesLogix has also automated fulfillment, helping to send quarterly fund information to those who have opted in to its "blast e-mail" programs.

"E-mail is one of the cornerstones of our business, and Sage CRM SalesLogix allows

**CHALLENGE**

New proactive sales and marketing division required a full-featured CRM tool to replace the little-used Profile database.

**SOLUTION**

Sage CRM SalesLogix for end-to-end customer relationship management and outbound sales and marketing.

**RESULTS**

Sales are up this year, thanks in part to Sage CRM SalesLogix capabilities that have the ability to send mass emails using seamless integration with Microsoft Office and Microsoft Outlook and customizable reporting.



Your business in mind.

*"We just had the best sales year in our history, increasing net cash inflows by more than 50 percent over last year. I doubt that this would have been possible without our outbound marketing and sales strategy in place, supported by Sage CRM SalesLogix."*

—Deb Well  
Director of E-Business

## 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.



us to capture all electronic communications in one place," Well explains. "Whether a message was sent through Outlook or from Sage CRM SalesLogix, anyone can access it, even from the field. For tracking interactions through e-mail, Sage CRM SalesLogix is about as close to perfect as you can get."

Harbor Capital and HCA Securities sales people go to Sage CRM SalesLogix for cross-channel information before setting up meetings. If traveling to Denver, for instance, a rep can see which advisors, banks or consultants are due for a visit, obtain contact information and coordinate appointments to maximize their time.

### Enhanced E-mails and Reporting

Well has designed numerous parameter-based reports. "We no longer have to create ad hoc reports for sales people because they can do everything themselves in Sage CRM SalesLogix," she says. "We've also written both snapshot and in-depth reports for management, so they can see what's going on in the field. They love having access to critical business data with the simple click of a button."

Harbor Capital and HCA Securities have implemented other special features such as a customized import methodology script for data from the major clearing platforms used by the Registered Investment Advisor channel. A custom view was created to give the sales representatives a view of the competitor funds a potential mutual fund investor is using or that are vying with Harbor for an existing opportunity. Additional custom views provide detailed information on registered investment advisors and the Harbor funds recommended at various broker/dealers.

"One of my favorite features in Sage CRM SalesLogix is the ability to send attachments with e-mails to large groups of contacts, and to answer e-mails for other people," says Well. "Sales reps out in the field can forward requests or questions and we can reply transparently on their behalf, as if reps were replying themselves. This represents an enormous time-savings for everyone. Both e-mails and attachments can be archived in our Sage CRM SalesLogix records, which gives us an all-encompassing storehouse of information."

Well credits her Sage CRM SalesLogix business partner for smooth implementation. "We couldn't have done it without them," she says. The reseller had worked with Well at her previous company, and worked hand in hand in every aspect of designing and implementing Sage CRM SalesLogix at Harbor Capital. They are currently reviewing ways to continue to enhance the system.

Can Well quantify the benefits of choosing Sage CRM SalesLogix? "We just had the best sales year in our history, increasing net cash inflows by more than 50 percent over last year. I doubt that this would have been possible without our outbound marketing and sales strategy in place, supported by Sage CRM SalesLogix."