



## CUSTOMER SUCCESS STORY

### CUSTOMER:

Capital Processing Network  
www.capitalprocessingnetwork.com

### COMPANY PROFILE:

Industry: Electronic payment processing  
Locations: 1  
Employees: 40  
Size: \$5+ million

SAGE SALESLOGIX



## CRM Partnership Powers Explosive Growth for Merchant Service Provider

In a mere seven months, merchant service provider Capital Processing Network went from nothing to more than an estimated \$5 million in revenues for 2007. What was their secret? Exceptional customer service to clients around the country, providing superior electronic payment processing products and services. This includes: credit card processing, check conversions with guarantee, wireless and e-commerce solutions.

Jeff Stephan, CEO, knew up front that one important key to their long term success would lie in selecting the right customer relationship management (CRM) software and business partner. So as soon as his company maxed out an off-the-shelf package, he went shopping for an upgrade that would support exponential growth, and interviewed close to ten candidates to be the new company's CRM consultant.

### Picking the Right Partner

"Most CRM consulting firms are just one- or two-person shops, without the depth of experience to handle a huge system like ours," he says. "In my heart of hearts, I just didn't trust a smaller CRM re-seller. Customer Systems, on the other hand, offered a rare combination of CRM software industry knowledge, engineering background and consulting expertise. They were extremely articulate in their presentations with us, and proved that they actually knew what they were talking about. In addition, the Sage SalesLogix system they proposed provided the power and flexibility we were looking for."

Customer Systems designed a Sage SalesLogix solution that now manages the three business units of Capital Processing Network, namely sales, customer service and technical support.

### CHALLENGE:

Start-up required full-featured CRM to manage millions of customer data records

### SOLUTION:

Sage SalesLogix installed and supported by Customer Systems, Inc.

### RESULTS:

CRM manages sales, customer and service and technical support, enabling exponential growth to \$5+ million sales in less than a year



***"With Customer Systems' solution, we find answers to client issues faster and more competently. This helps us provide the best service in the industry, bar none – propelling us to speedy success."***

— Jeff Stephan, CEO  
Capital Processing Network



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The software automates all aspects of client contact and account maintenance, including monitoring point-of-sale (POS) systems and hardware.

**Superior Security and Accuracy**

Because Capital Processing Network deals with financial information, security must be very tight at all levels. "Sage SalesLogix lets us protect sensitive data that is required to service merchant bank accounts. We can give users specific privileges, but also restrict access to the bare minimum user privilege necessary to handle a client maintenance request. This ability gives our clients confidence, and permits them to entrust the lifeblood of their business to us," says Stephan.

Accuracy has been essential as well, according to Stephan. "We are in a boutique niche of the banking business, where even a tiny error can result in hundreds of thousands of dollars in losses per second. So accuracy is paramount. To make things even more complicated, we have millions of records of data. SalesLogix allows us to manage all of this data effectively and with great precision."

**Better Customer Issue Resolution**

One area of dramatic improvement has been in technical service and hardware maintenance. The company uses Sage SalesLogix to assign a case identification number for each customer issue. The system schedules call backs for reminders, eliminating the possibility of human errors. It assigns action items to peers within the company if an employee is unable to handle assignments.

Sage SalesLogix also lets internal employees view one another's calendars. This has improved productivity and issue resolution rates, which in turn contribute to greater customer satisfaction.

**Support for Consultative Selling**

Capital Processing Network appreciates the way Sage SalesLogix fits its corporate culture. "We consider ourselves to be true business partners with our clients, rather than traditional vendors, so our sales approach is non-threatening," explains Stephan. "SalesLogix supports this. We can keep CRM activities transparent to clients. Rather than coming across as pushy vendors, the software gives us the detailed data we need to be trusted advisors."

Another key benefit of the SalesLogix system has been in improved employee morale. "Most of our employees have never had the advantage of using such a robust software to perform their daily duties at their previous employers. They're amazed at how fast our database is, and how it streamlines their daily workload. They really appreciate this, and as a result the SalesLogix implementation has played a major part in contributing to a creative, productive and positive work culture that just breathes success," Stephan explains.

**Service for Success**

Stephan is pleased with the ongoing relationship with his business partner. "Because they have so much prior experience in CRM products, Customer Systems has proven to be very fast. They're responsive to our needs. And they are truly dedicated to getting the job done right. As an example, before we went live, their representative worked here for 30 hours nonstop to make sure everything went smoothly. You certainly don't see that kind of commitment very often," he says.

"The bottom line is that with Customer Systems' solution, we find answers to client issues faster and more competently. This helps us provide the best service in the industry, bar none – propelling us to speedy success."