



## CUSTOMER SUCCESS STORY

### CUSTOMER:

Dinan & Company LLC  
Phoenix, Arizona  
www.dinancompany.com

### COMPANY PROFILE:

Industry: Investment banking  
Locations: 2  
Employees: 55

Users on Sage SalesLogix: 50

### SAGE SALESLOGIX



## CSI Delivers Dynamic Efficiencies for Dinan & Company

Customer relationship management (CRM) software is everything to firms like Dinan & Company, who rely on data and connections. The Phoenix-based investment banking group is now the largest and most successful buy-side merger and acquisition company in the nation. Something like a headhunter for companies rather than employees, Dinan helps firms interested in mergers find one another. A quiet, confidential operating style – plus a strong, reliable database – are essential.

Dinan was having big problems with its CRM, however, which hampered both efficiencies and growth. "We'd maxed out our previous CRM, so it crashed frequently," explains Mike Dinan, president. "Also, the manufacturer had been acquired by another company, who discontinued support. We were stuck with a dead horse, and had no choice

but to look for a replacement – preferably something more robust, to handle our needs for many years in the future."

### Sage Software Recommends CSI

After comparing available products, Dinan & Company selected Sage SalesLogix as the best of breed. Then they called Sage Software to recommend a business partner for installation. "We were very fortunate to be directed to Customer Systems," Dinan says. "Not only were they nearby in Arizona, but their principals were former Sage Software employees, and experts in Sage SalesLogix."

Customer Systems Inc. (CSI) implemented an end-to-end CRM for Dinan & Company that went live in early 2007. "We were impressed with CSI from the very beginning," says Jeremy Wallace, principal. "They sat down with us and

### CHALLENGE:

Company outgrew existing CRM, which was crashing and was also no longer supported by manufacturer

### SOLUTION:

Sage SalesLogix with implementation and ongoing support from Customer Systems, Inc.

### RESULTS:

Duplicate data entry has been eliminated; Sage SalesLogix has made company "exponentially more productive"



***"Our new CRM from CSI has made us exponentially more productive. We now have an extremely stable platform that can grow with us."***

— Mike Dinan, Dinan & Company



**CUSTOMER SYSTEMS**

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**Authorized Partner**

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did a thorough analysis of our firm, isolating our critical business processes. Then they showed us how Sage SalesLogix could be configured to match the way we do business. This instilled a lot of confidence in us. We could see that they knew exactly what they were talking about."

**Sophisticated CRM Capabilities**

Today Dinan & Company uses CSI's Sage SalesLogix system to run practically everything except its financials. Once a prospect becomes a client, a file is initiated to store all contact information and related notes. This information is provided to Dinan & Company's research team in New Delhi, India, who uses data stored within Sage SalesLogix to identify possible prospects for a merger or acquisition. Because Dinan & Company has been in business for nearly 20 years, its database has become extensive, with new additions being entered every day.

Names of prospective merger businesses are provided to another group at Dinan & Company in the United States, who approaches company owners. All notes, letters, emails and faxes are maintained in Sage SalesLogix. The results are shared with a third group within Dinan & Company, who manages contact with clients to complete the merger or acquisition process.

**Single Repository for Data**

Before, Dinan & Company maintained customer and prospect information in a customized version of Microsoft Outlook and multiple spreadsheets, as well as its CRM. CSI consolidated these diverse storage locations into Sage SalesLogix. "Now we only have to enter data once, which saves time and improves accuracy," says Wallace. Dinan has found similar efficiencies. "Investment bankers

provide advisory services, and the quality of those services depends on our ability to provide accurate information to clients," he says. "Sage SalesLogix lets us track, monitor, and process each opportunity very effectively, improving our competitive positioning."

**Great Training and Support**

CSI provided initial training during implementation of Sage SalesLogix, and continues to partner with Dinan & Company for ongoing support. "CSI did an excellent job helping us transition to our new system. Sage SalesLogix is significantly different than what we had before, so we appreciated their thorough approach to getting our staff up to speed," says Wallace.

"We also rely on CSI for answers to routine questions and troubleshooting. About 95 percent of the time, they provide support remotely by dialing into our system, which is really convenient. They've always been able to fix things rapidly, and are pleasant and easy to work with," he continues.

**Stable and Scalable**

Dinan & Company has been pleased with its choice of CSI and Sage SalesLogix. "Our new CRM from CSI has made us exponentially more productive," says Dinan. "We now have an extremely stable platform that can grow with us."

"Sage SalesLogix is much more feature-rich than the CRM we had before, and we're constantly finding new and better ways to use it," adds Wallace. "And we're glad to have CSI as our business partner, too. We can trust them to keep SalesLogix running smoothly, so we can forget that it's there and focus on our own business."