



CUSTOMER SUCCESS STORY

CUSTOMER:
Grand Canyon Planning Associates, LLC
Scottsdale, AZ
www.grandcanyonplanning.com

COMPANY PROFILE:
Industry: Insurance & estate planning
Locations: 1

SAGE SALESLOGIX



CSI Helps Grand Canyon Planning Associates Start Out Strong

"Reaching your goal, one step at a time." That's the motto of Grand Canyon Planning Associates (GCPA), a thriving insurance and estate planning company in Scottsdale, Arizona. After working together for 15 years at their previously owned company, John and Tracey Dombroski sold the company and started GCPA in 2003.

Today their staff helps Arizona residents with a wide variety of financial and life planning needs, including estate planning, and the preparation of living trusts, wills, powers of attorney, long-term care, life insurance, annuities and Medicare supplements.

"We knew that in order to reach our own goal, we needed to start our company on a solid footing with the right software consultant," explains John. "We had worked closely with Customer Systems

as our business partner in our former company, and never even considered using anybody else. One of our first moves was sitting down with them to create a strong customer relations database."

A Superior Sage SalesLogix System

Customer Systems Inc. (CSI) designed and implemented a full-featured Sage SalesLogix system for GCPA. Today Sage SalesLogix has automated almost all the non-accounting functions in the business.

"As we contact a potential client, we enter them into the Sage SalesLogix database as a prospect. When an appointment is set, that also gets entered into the system, and is posted to the appropriate person's calendar.

CHALLENGE:	SOLUTION:	RESULTS:
Start-up company needed full-featured customer relations management system to track all client contacts and plan for future activities	Sage SalesLogix implemented by Customer Systems, Inc.	Automated customer information system and shared calendars ensure that details are not missed, which cuts staff time and increases customer satisfaction

"If you're looking for a partner who will sincerely look out for the best interests of your business, call CSI. Allow them to do their job – rather than what you think you want – and you'll be amazed at what they can accomplish."

— John Dombroski, President,
Grand Canyon Planning
Associates



**CUSTOMER
SYSTEMS**

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We can all view one another's calendar, and easily redirect tasks to each other when necessary, a tremendous time savings," says John.

"The system is triggered once a prospect turns into a genuine client, and the correct paperwork is processed. Sage SalesLogix then tracks the progress of any work we undertake for the client, so we have a complete history for future reference."

Clear Communications

"One of the greatest benefits of our Sage SalesLogix system is that it establishes excellent channels of communication within the company. For instance, if I want to set up a meeting, I simply look at everyone's calendars and schedule something. There's no need for me to send emails and wait for replies. Or I can transfer a project to one of my colleagues who has greater experience in a particular area than I do, or who has a lighter load. This saves us all a lot of time, and increases our collaboration as a team," John notes.

"The software also helps us provide the very best possible service to our customers, which is how we differentiate ourselves. It guarantees that we follow up on every single promise we make," he continues.

"Consistent follow-up improves client loyalty. You don't realize the revenue that just one client can produce. Not losing that one client pays for the entire SalesLogix system. In fact, you couldn't put a price on the way SalesLogix helps us retain every single customer – it's that important."

Close with Consultants

How does John like CSI, his Sage Software business partner? "They've helped us so much that we've become quite close friends," he says. "They're always there for us, no matter what. Evenings, Saturdays, or whatever – they go out of their way to resolve problems for us," he says.

"CSI had proved themselves as excellent consultants in our previous company. They did the same thing during our implementation at Grand Canyon Planning. They made sure that the process went smoothly, and also trained us so we could run the system ourselves. They're always in contact with us either by phone or e-mail, asking if there's anything else they can do to make our office run smoother. Yet they're never pushy, either. We consider them to be an important part of our success."

Does John have any advice for other start-ups needing customer relations management software? "If you're looking for a partner who will sincerely look out for the best interests of your business, call CSI. Allow them to do their job – rather than what you think you want – and you'll be amazed at what they can accomplish."