



CUSTOMER SYSTEMS

Customer Systems Inc. CRM Solution Benefits NFB A SalesLogix® CRM Solution

Where there's a will, there's a lawyer. Where's there's a living trust, there's National Future Benefits.

National Future Benefits (NFB) of Scottsdale, Arizona assists individuals and their families with estate planning by establishing living trusts, and obtaining life and long-term care insurance. Estate planning is no longer reserved for the wealthy; individuals across all economic sectors are realizing the value of planning for the ultimate distribution of their assets. Contributing to its success and rapid growth is NFB's ability to offer its 5,000+ customers a level of service and value not possible from typical law firms.

The Challenge

Since its founding in 1994, NFB has experienced phenomenal growth and now employs more than 40 individuals to support operations. The lack of a centralized database to organize the massive amount of data was beginning to impact NFB's efficiency. A customer's file must pass through several departments and across the desks of many individuals to complete the required processing. When a customer called with a question, or when a staff member needed information, the hunt began for the physical file folder. Employees wasted a significant amount of time each day just locating the files needed to perform their tasks.

Two ACT! databases held separate customer-related data—such as the Christmas card list and prospect follow-ups yet only one user could access ACT! at any time, essentially rendering ACT! useless as a business tool for the busy staff.

“We realized that we needed a server-based product, accessible to all of our employees,” explains Tracey Dombroski, NFB's Vice President of Operations. “We were really just searching for a multi-user contact management program, and we looked at Goldmine and some others, but weren't wowed.” After a recommendation from

a trusted colleague, NFB spoke with Customer Systems, Inc. about SalesLogix, and arranged a meeting and demonstration. “We were immediately impressed with Customer Systems. They opened our eyes to what SalesLogix could do for us—far beyond simple contact management.”

Management Tool

Customer Systems adapted SalesLogix to NFB's business model, and developed

a set of custom tabs and program changes that has turned SalesLogix into a comprehensive business management tool. A custom tab in SalesLogix tracks the movement and location of a customer file. Staff can see at a glance who has the physical file folder and what is currently being done. “This single feature was worth the whole proj-



National Future Benefits helps individuals and families with Estate Planning, Living Trusts, and more.

ect,” says Dombroski, “It dramatically reduced frustration levels and wasted time.” Staff can now track files as they move through the various departments, with a complete record of who has seen the file, what they have added, and who is currently working on it. All pertinent account data is stored within SalesLogix, enabling all to perform their tasks and answer customer questions often without the physical file.

The insurance products NFB sells may often be funded from five or more different accounts. A separate custom tab in SalesLogix efficiently organizes the details of these transactions, making it easy to determine when funds have arrived and the status of each application. Another tab holds payment and account balance information, completing the comprehensive view of each customer.

Dombroski credits Customer Systems for the successful deployment of SalesLogix, remarking on their excellent implementation and training services. “Customer Systems learned our business and understood our terminology. They were then able to offer suggestions that dramatically increased the usability of the software. Customer Systems is absolutely wonderful. I have nothing but positive things to say about them.”

Monitor Activities

As the staff logs in to SalesLogix in the morning, they first access their activity view, making it easy to organize their day. Activities can be grouped by date, account, priority, or type (e.g. call, meeting) for convenience. Department managers can monitor the progress their employees make on each activity, quickly responding to overdue tasks, or redistributing work as needed. The entire staff relies on the calendar feature in SalesLogix. The Telesales department schedules appointments and sales calls for the representatives, with full awareness of the other activities the representatives have already scheduled. Dombroski appreciates that she can view each employee’s calendar, knowing who is expected in the office on any given day.

To automate even further, NFB plans to implement the SalesLogix Process Manager, and create processes, or series of events and activities that can be assigned to a contact, to help standardize operations and increase efficiency. For example, after an initial tele-marketing call identifies an interested prospect, NFB could assign a

custom process to that contact which would set off a series of automated events, possibly including such tasks as: send literature pack, follow-up phone call, schedule meeting, generate proposal, etc.

Using processes, SalesLogix can automatically schedule the next task in the process when the preceding task is completed. It’s simple to monitor each contact’s stage in the process, and management can quickly identify all customers at a given stage, and which tasks are complete, upcoming, or overdue.

Developing New Opportunities

The data NFB is now able to collect and store is invaluable. Not only does SalesLogix provide the ideal receptacle for this data, ensuring it is kept organized and available to authorized users, but SalesLogix also makes the data available for strategic planning and marketing programs. “We are able to identify which customers have a specific kind of policy and then market a complementary product or service to them,” says Dombroski. Analyzing potential opportunities against actual sales allows management to determine which approaches are most successful.

Much of NFB’s business comes through referrals from their customer base. Dombroski likes to acknowledge customers that generate referrals with a thank you letter. She likes to vary the content of the letter depending upon whether the customer has generated one referral or several. SalesLogix lets her track the referral source of each account; compile lists of those sources and the business they’ve generated, and to create customized correspondence, thanking customers for their referrals.

Benefits Now And Into The Future

Dombroski continues to be impressed with the service she receives from Customer Systems, Inc. “The staff at Customer Systems has a rare blend of professionalism and personality that makes doing business with them not only a successful experience, but a pleasant experience as well.”

For National Future Benefits, success depends upon its ability to offer personalized service at competitive prices. *SalesLogix and Customer Systems facilitate those goals, delivering tangible benefits now and into the future.*

Customer Systems is a leading provider of Customer Relationship Management (CRM) solutions. Our products and services allow companies to take advantage of emerging market opportunities to drive business, improve efficiencies, and positively affect the bottom line.

By providing excellent customer service, best of breed technologies, and market-leading experience, Customer Systems successfully enables leading companies of all sizes to increase sales, maximize efficiencies, and grow market share.



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