



CASE STUDY

SOFTWARE

**Organization:**

InfoManager Corporation

Industry:

Software

Products:

GoldMine® Corporate Edition

Web site:

www.infomanagerinc.com

FrontRange Solutions Partner:

Professional EDGE

Quick Stats:**Employees:** 30**Users:** 25**Operating environment:** SQL server, MS Windows

GoldMine® Corporate Edition Keeps Worldwide Software Company on the Same Page

COMPANY PROFILE

In the increasingly fast-paced information age, InfoManager Corporation helps businesses make the most of their information assets. Based in Helsinki, Finland with sales offices in Sweden and Dallas, Texas, InfoManager develops and provides a full range of business intelligence and analytical application software and services that enable businesses to more effectively extract, analyze, manage and report on all types of mission-critical data. Its services include project management, consulting, installation, system implementation, training, on-going support and software maintenance. InfoManager's worldwide client base includes companies like Canon, IBM, Discount Tire, United Rentals, Toyota, Volvo, Crosman Corporation, Baldwin Hardware and Mobile Storage.

BUSINESS NEED

With an ocean and 8,000 miles separating its offices, InfoManager is a highly distributed software company. Moreover, the company has internal and external sales reps located around the world serving customers on several continents. Needless to say, InfoManager counts on technology to run its global operation.

Previously, InfoManager used a Lotus Notes-based CRM solution. Without a simple way to synchronize their activities, users each had their own versions of the software and individually created contact records with no way of integrating their worldwide

efforts. As a result, the company found it challenging to effectively track opportunities, execute marketing campaigns and record all communication among the staff, and with customers and prospects.

“GoldMine offers an unbelievable amount of functions and features. I couldn't believe that, for the price, it does all these things. You don't have to pay an arm and a leg to build a worldwide CRM solution.”

– Petri Salonen, CEO, InfoManager

GOLDMINE CORPORATE EDITION SOLUTION

InfoManager considered a number of different CRM solutions. Having previously sold and implemented CRM applications, the company knew what functionality it needed. Purely Web-based applications weren't practical, since traveling representatives often don't have access to an Internet connection, but still need to manage their contacts. Others were too costly or hard to use and maintain. Ultimately, InfoManager chose GoldMine Corporate Edition from FrontRange Solutions for its exceptional combination of functionality and affordability.



Business Benefits Realized:

- Affordable CRM solution integrates InfoManager's global team.
- Sales reps track and categorize leads by their readiness to buy, to create a view into the sales pipeline.
- InfoManager imports external contact lists into GoldMine, then executes e-mail or direct mail campaigns to hundreds of contacts in minutes.
- GoldMine stores all details about existing customers, enabling InfoManger to communicate professionally and effectively.

"GoldMine offers an unbelievable amount of functions and features," explained Petri Salonen, InfoManager CEO. "I couldn't believe that, for the price, it does all these things. You don't have to pay an arm and a leg to build an effective worldwide CRM solution."

With the help of Professional EDGE, a Dallas-based FrontRange Solutions Partner, InfoManager initially implemented a dBase version of GoldMine. After a year, the company transitioned to a client/server application. Today, Salonen calls GoldMine "the single most important application running in the organization." The software keeps the company's worldwide team in sync, supporting everything from sales to marketing campaigns to managing existing customers.

INTEGRATING DISPARATE SALES REPS INTO THE COMMUNICATION STREAM

GoldMine has proven essential for tying together InfoManager's global sales team. The company works with a combination of internal reps and external partners – all of whom rely on GoldMine to track the status of leads and opportunities. They can record every meeting, phone conversation and even e-mail messages because they send and receive all e-mail through GoldMine. InfoManager can also import prospect names from outside list providers directly into GoldMine. Daily, sales reps place cold calls from the database of contacts, and quickly add notes to each GoldMine contact record.

When InfoManager releases a new product or has announcements for prospects and customers, GoldMine helps the company launch e-mail campaigns to alert hundreds of contacts. They easily build filters to sort the database and deliver different announcements to separate groups of contacts. For example, a filter can be created just for existing users of

their software in Germany. Most importantly, to eliminate redundancy of effort and ensure the company communicates consistently with contact groups, filters created in one location can be used by others in different locations.

"With everything in one package, when we build filters or categories, anybody in my organization worldwide can use them to send information," Salonen said. "Within minutes, I can send an e-mail to communicate with hundreds of contacts."

A VIEW INTO THE SALES PIPELINE

As prospects progress through the sales cycle, InfoManager reps uses the Opportunity tab in GoldMine to categorize them by stage, depending on their readiness to buy. At any given time, a report can be generated to determine the number of prospects at different stages, providing insight into sales pipeline and help with forecasting. Because most of the company has access to GoldMine, other departments, such as the Controller's Office, can easily pull all opportunities by sales rep or company. Previously, this required InfoManager to build a variety of Excel spreadsheets manually.

At the close of each business day, all GoldMine users synchronize with the main server in Dallas. Universal access to the same information allows reps to see whether a lead has already been registered.

COMPLETE RECORDS OF EXISTING CUSTOMERS

Beyond sales, GoldMine helps InfoManager manage its existing customers by storing a wide range of details about each one. For example, InfoManager easily created custom fields on contact screens for recording information such as software license numbers, release number, annual maintenance details





What's Next?

InfoManager will implement iGoldMine to enable real-time access to GoldMine from any Internet connection. Plus, the company will continue to explore additional GoldMine functionality to bring more efficiency to its operations.

and number of users. They can also access customer information such as contracts and payment details, and turn to the complete history of communication if an issue arises.

For Salonen, GoldMine's true return on investment lies in keeping all his people on the same page, which ensures that they never miss key opportunities and that they manage customers effectively.

"It's essential that we have a common way of communicating with customers," said Salonen. "GoldMine keeps all our distributed people together and provides a centralized database where we keep and update all of our customer information. It allows us to nurture our customer relationships because we can keep everyone informed. I could lose a \$100,000 deal if I didn't recognize that I should call a customer or prospect at any given time. I don't know how we would track our customers and prospects without it."

SUMMARY

From the start, InfoManager approached GoldMine from the standpoint of serving the company's customers and partners more effectively. GoldMine's flexibility and ease of use allowed the company to tailor the software to its business processes – resulting in a system that truly suits the company's ongoing needs and saves considerable time in sales, marketing and customer management.

By synchronizing daily, users worldwide have access to the same contact database, which gives them a complete picture of all internal and external communication and activities. A full record of all leads and customer histories ensures they seize every opportunity and handle customers in the most professional manner possible.

Salonen sees additional opportunities to get even more value from GoldMine. InfoManager plans to implement iGoldMine to provide users with GoldMine access from any Internet connection, in real time. Plus, there's always more functionality to explore.

"Even though we have used GoldMine for three years, it is so robust that we are always discovering new features and functionality to try on a near-weekly basis," said Salonen. "If we've been successful and profitable with GoldMine so far, imagine what we can accomplish when we're taking advantage of all of its capabilities."

