



SEI Investments Sales Productivity Up Almost 300% With Sage SalesLogix

John Yackel had a challenge: create a sales team within the Investment Manager Solutions unit of SEI Investments, a global technology and investment services firm. The team would be responsible for selling strategic outsourcing solutions to the investment management marketplace.

“I knew I would need salespeople and sales processes,” says Yackel, vice president and managing director. “And I felt strongly that we needed a CRM solution that was quickly deployable and would support a highly complex sales process—something flexible out of the gate.”

Flexibility and Usability Required

After examining several solutions, from contact managers to enterprise-size packages, Yackel decided Sage SalesLogix from Sage Software was the right solution.

“We typically offer multiple products and services to an organization,” he explains. “Sage SalesLogix has a design and workflow that more intuitively handles the complexities of that kind of sales process while being highly user-friendly.”

“The question I asked myself was, ‘What will my people use?’ Sage SalesLogix was the answer.”

Another consideration was ease of customization and implementation. To implement their Sage SalesLogix solution, Yackel chose Cotelligent, an authorized Sage Software business partner. He believed Cotelligent could tailor the system to meet his group’s needs and have it up and running quickly.

The timeline was tight, but Cotelligent had SEI’s Sage SalesLogix system ready to use in just 45 days. The system was operational with external data imported, plus both LAN and remote users online and synchronized. Salespeople using handheld devices were also able to access and synchronize to their Sage SalesLogix data right away.

Cotelligent provided two days of training, but a recent addition to Yackel’s team needed only two hours. Yackel says, “Sage SalesLogix is so intuitive that new users don’t require extensive training.”

Customer:

SEI Investments

Industry:

Global Technology and Investment Services

Location:

Philadelphia, Pennsylvania

Number of Employees:

1,500 Worldwide

System:

Sage SalesLogix

CHALLENGE

SEI needed a flexible CRM solution that would support its highly complex sales process.

SOLUTION

Sage SalesLogix customized wizards standardized and automated critical functions in just 45 days. Now vital information is shared between front- and back-office systems.

RESULTS

With Sage SalesLogix in place, SEI’s salespeople are now capable of handling nearly three times as many opportunities as they were before.

An Irreplaceable Tool

“The implementation came in on budget and on time,” comments Yackel. “The most important thing to me, though, is that everyone on my team utilizes and relies on Sage SalesLogix. It’s an essential element of our sales process.”

Created by Cotelligent, the Opportunity Wizard helps SEI’s sales team gather and organize information about prospective clients, which is then used to feed management reports. “Our salespeople like it because they don’t have to take any ‘extra’ actions to supply me with reports,” says Yackel. “I get the data from Sage SalesLogix and export it into SEI’s corporate reporting system, sharing vital information between front- and back-office systems.”

Cotelligent also developed a process to integrate data from several outside vendors into SEI’s Sage SalesLogix database. “The process updates existing account records and creates new ones, then assigns them to the appropriate account manager,” says Keith Toland, manager of CRM implementations, Cotelligent. When finished, SEI’s salespeople have fresh data about their customers and prospects available for immediate use.

Since implementing Sage SalesLogix, the number of opportunities Yackel’s team is handling has risen significantly. Even taking into account that the team doubled in size, each salesperson is managing almost three times as many opportunities as before.

“Sage SalesLogix is helping us manage those opportunities, so we’re more effective in closing deals,” Yackel says. “Without Sage SalesLogix, we still might have a lot of opportunities in the pipeline, we’d just have more difficulty managing them.”

“From evaluation to implementation and utilization, Sage SalesLogix has exceeded all our expectations,” concludes Yackel.

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Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

