

## CUSTOMER SUCCESS



## Sage SalesLogix Helps Sam Maguire Open More Opportunities with Every Closing

Like many states, Georgia requires that an attorney be part of real estate transactions. Managing multiple parties and endless paperwork can be challenging. Thanks to Sage SalesLogix, The Law Offices of Sam Maguire, Jr., P.C. has more than 10,000 clients and has over \$2.1 billion in real estate loans closed. Why are they one of the highest volume loan closers in the Peachtree State, nearly doubling their repeat business volume in 18 months without increasing staff? Instead of “location, location, location” Sam Maguire emphasizes “relationship, relationship, relationship.”

### Online Data Entry Puts Everyone in the Loop Early On

Proactive monitoring and automatic alerts generated by Sage SalesLogix KnowledgeSync, and the ability to customize Sage SalesLogix, enable the firm to link all kinds of customer relationships in their database. The firm leverages this information and notifies parties involved in the relationship at any point in the transaction. “Sage SalesLogix is like having a silent employee working 24-7 on a multitude of humanly impossible functions that are unique to each customer,” says Sam Maguire. “By entering each party involved in a transaction into our Sage SalesLogix system, buyers, sellers, builders, realtors, and lenders can review, delete, or forward the information to another person involved. They participate earlier, we create a relationship earlier, and stay connected after the fact.”

Adding 1,200 people to the database each month plus 6,000 outgoing e-mail messages a day generates a great deal of data that would be impossible to manage without Sage SalesLogix. “On each customer’s birthday, they receive an auto-generated e-mail birthday greeting from us. Our firm, along with everyone else associated with the customer’s real estate transaction, also receives an e-mail announcing the birthday. Sage SalesLogix enables us to help promote everyone’s business by capitalizing on this unique relationship building opportunity. Sage SalesLogix has increased our customer retention level, doubling our repeat business volume. It makes the business process so distinct that it almost watermarks the transaction identifiable as a Sam Maguire transaction.”

#### Customer:

**The Law Offices of Sam Maguire, Jr., P.C.**

#### Industry:

Real Estate Closings

#### Location:

Atlanta, GA

#### Number of Locations

Four

#### Number of Employees:

35

#### System:

**Sage SalesLogix**

#### Modules in Operation

- Sage SalesLogix Sales
- Sage SalesLogix Marketing
- Sage SalesLogix Customer Service
- Sage SalesLogix Support
- Sage SalesLogix KnowledgeSync

### CHALLENGE

Increase repeat business with thousands of customers through strategically timed contact.

### SOLUTION

Sage SalesLogix, a customizable solution that proactively monitors customer information and transactions, facilitating effective communication and helping foster profitable relationships.

### RESULTS

Nearly doubled their volume of real estate closings in 18 months without increasing staff.

### FedEx Integration Absolutely, Positively Saves Big Bucks

Often, customers would call several days after closing thinking that the firm had not paid off a mortgage because their lender did not know they had received the payoff. Now, Sam Maguire uses a module built by the Sage SalesLogix business partner that tightly integrates FedEx with Sage SalesLogix. "When loan papers are processed, the loan closer uses Sage SalesLogix to set up all the outgoing FedEx shipments for payoffs. It automatically sends the customer and their lender a FedEx acknowledgement with a tracking number, so everyone knows it's there. If it's rejected and interest starts accumulating then that person becomes a participant," says a relieved Sam Maguire. "Before, they expected me to pay the interest difference. It's saved me quite a bit of money by not having to pay the interest. Most importantly, Sage SalesLogix minimizes our risk exposure because if the customer thinks we haven't gotten the payoff to their lender, we're fired."

### Ranking Customers Dynamically

Since Sage SalesLogix customizes to fit specific user needs, the Sage SalesLogix business partner created an auto-manager feature that "turns our basic boring attorneys into strategic marketing managers. Instead of just micromanaging the details of each transaction, they now have a macro view of the entire market, and can prioritize who to call on for business development, while keeping an eye on the competition." The firm ranks its customers based on how much business they receive. It also sets up strategic lists of lawyers, lender staff members, and realtors in active files for e-mail correspondence. "If it snows, I check off 'snow day' and Sage SalesLogix looks at all the closings for that day, associates the closing number, and notifies all the parties of the cancellation, so we don't get calls asking what's going on."

"Sage SalesLogix can do anything. Our Sage Software business partner caught on fast helping us capitalize on what's most important now. They provided measurable results by the third meeting."

All four Sam Maguire offices have access to the information and tools they need, and are more strategically focused. Repeat business has increased significantly. "We're getting rave reviews. Morale is up because employees are more informed about customers before they come in." Sage SalesLogix is making a big difference.

---

*"Sage SalesLogix is like having a silent employee working 24-7 on a multitude of humanly impossible functions that are unique to each customer."*

---

## ABOUT SAGE SOFTWARE

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.

**sage**  
software  
*Your business in mind.*