

## SalesLogix

### CUSTOMER

#### Conferon

[www.conferon.com](http://www.conferon.com)

### CORPORATE PROFILE

#### Headquarters

Cleveland, Ohio

#### Type of Business

Meeting Planning

#### Number of Employees

200+ employees at corporate headquarters and five regional offices

### APPLICATION

#### Software

- SalesLogix
- MAS 90
- Dynalink for SalesLogix

#### Number of SalesLogix Users

150 Web-based users and  
9 LAN-based users

## SalesLogix Web Client Helps Conferon Grow

Meeting planning may seem simple, but the work that goes into booking facilities, coordinating equipment and handling staffing to make successful meetings and events is staggering.

That's why many companies turn to Conferon, the nation's largest independent meeting planning company. For more than 30 years, Conferon has flawlessly executed annual conventions, sales meetings, tradeshows, special event, and all types of customer-oriented functions.

At double-digit growth rates for the past decade, Conferon needed a way to efficiently manage sales and opportunities, whether they came from an ever-expanding worldwide sales staff, electronically via Web-based leads, or via email requests for proposals. Thus, the search began for a complete CRM solution.

### Data in Disparate Systems

"Conferon's salespeople were keeping track of sales and customers with contact management systems, spreadsheets, and an overburdened DOS-based system," said Wynne Chambless of XBSS, LLC,

a SalesLogix Business Partner. "Conferon needed a system that would be easy to deploy and that would allow independent salespeople to use the system via the Web."

"We spent a lot of time investigating solutions and were actually halfway through the buying cycle with another one," said David Peckinpaugh, Conferon's vice president of sales. "However, we realized that with the addition of SalesLogix, all our customer-facing systems could be tied together," Peckinpaugh continued. "Our Sant automated proposal system integrates with SalesLogix, and we use Dynalink to interface with our MAS 90 accounting package. You can't imagine how information sharing improves sales productivity and customer service!"

### Up and Running in Just 45 Days

The first phase of the project was to bring Conferon's contact and account management into SalesLogix. "We needed to start there to enable data sharing, which was critical for our success moving forward," Peckinpaugh said. This phase was rolled out in 45 days, including importing

#### CHALLENGE

Conferon was using an outdated system to track its sales, opportunities and customers. It needed a CRM solution with strong opportunity management and the ability to integrate with existing software.

#### SOLUTION

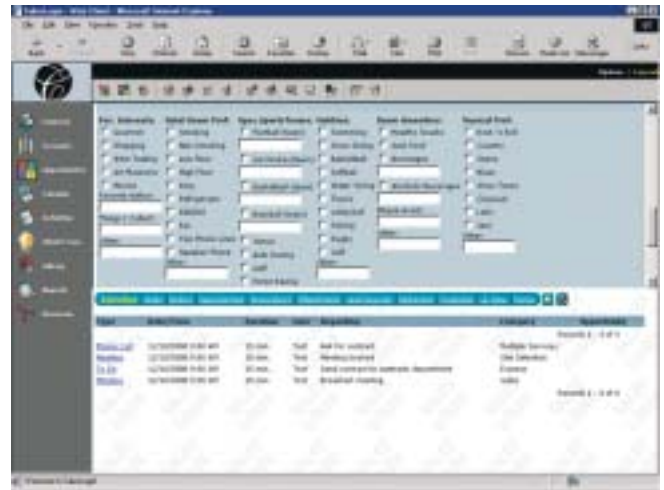
SalesLogix integrated with their MAS 90 accounting system and Sant, their automated proposal system.

#### RESULTS

With SalesLogix, Conferon has seen more efficient and effective reporting, forecasting and planning throughout their internal and external sales teams so they could maintain their double-digit growth rates.

*“SalesLogix has become part of our daily sales process and a critical tool for our future growth. Every time we’re in a strategic planning session, our thought process immediately turns to integration into SalesLogix.”*

*David Peckinpaugh  
Vice President of Sales  
Conferon*



data from multiple legacy systems and several customizations.

“We don’t have a large IT staff, so XBSS, LLC’s ability to develop and customize has been a huge asset,” Peckinpaugh continues. “They have been instrumental in steering us during this process and our relationship with them has been invaluable.”

Formal training began with a four-hour session including laptop set-up, workstations and a tour of SalesLogix. This was followed by two weeks of e-mailed activities giving the reps practical experience using the system. “I think the speed of implementation caught the company off-guard,” Peckinpaugh said. “It was nice to surprise them with our speed to market.”

### **Profound Impact on Sales Force**

Conferon now has 150 employees using SalesLogix via the Web, and that number is continually growing.

“We’re quantum leaps above where we were,” Peckinpaugh said. “SalesLogix has had a profound impact on our sales force.”

“It’s been very easy, friendly, and logical for our salespeople. We haven’t had to force the system on them. It makes sense to them and matches their workflow. We now have a central source for sharing account information among our account executives, account planners, meeting managers and our small business department,” he continued. “SalesLogix has enabled us to define our sales process, we have a clearer picture of deals in the pipeline and their status.”

“SalesLogix has become part of our daily sales process and is a critical tool for our future growth,” Peckinpaugh concludes. “Every time we’re in a strategic planning session, our thought process immediately turns to integration into SalesLogix. It’s one of the best investments we’ve made.”



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