

CASE STUDY



www.intelligentsiacoffee.com

Chicago's Intelligentsia Coffee & Tea, Inc. was founded in 1995 on the premise of buying, roasting and serving the finest coffees available. The company operates retail stores in multiple locations as well as a wholesale division. Intelligentsia purchases its coffee from either the most renowned importers or directly from the growers themselves. Whenever possible, Intelligentsia seeks growers and importers that are known to be both environmentally and socially responsible.

Business Needs

- Ease of Use, Convenience
- Cross-Functionality of CRM and Accounting Software

Impact of SalesLogix

- Increased Flow of Order History Information
- Streamlined Reporting Capabilities and Overall Usability

Impact of Partnership with Technology Advisors

- CRM Expertise
- Future Enhancements to SalesLogix

Intelligentsia Coffee Revamps Sales Processes through Sage SalesLogix CRM and Technology Advisors

Critical Business Capabilities

As a leading wholesale and retail seller of coffee, tea and coffee products, Intelligentsia's sales team must have access to and manage a large amount of order and customer information. The company was using a CRM application to keep track of this information, but employees began to notice that the system was clumsy and difficult to use. For example, the Intelligentsia team could access Outlook e-mails through the system, but not respond to them, and the system required its users to manually locate and upload frequently used documents upon each use instead of making them readily available. Intelligentsia needed a CRM application that would address these types of issues and provide a comprehensive, easy to use solution.

In addition, Intelligentsia had recently switched accounting software to MAS 200 and was looking for a CRM solution that would integrate well with the new system. The integration of CRM software with MAS 200 would enable sales personnel to keep up to date on client account information, giving them the insight and ability to quickly identify opportunities for cross-selling and up-selling, access comprehensive payment information, identify additional purchasing power and generate more accurate proposals and quotes. In addition, the integration would allow individual departments within the organization - from sales to finance to training - to work together to build new and existing customer relationships.

A True CRM Solution

With these issues in mind, Intelligentsia set out to find a CRM application that would make conducting everyday business easier for its employees. The company began the search for the ideal solution and partner, researching multiple options and narrowing the field to a select few.

In the end, Intelligentsia consulted Des Plaines, IL-based Technology Advisors, Inc., who recommended Sage's SalesLogix CRM as the CRM solution that would be most beneficial.

"The interview process with Technology Advisors allowed us to gain a clear understanding of which products would best suit our needs," said Paul Rekstad, National Sales Manager at Intelligentsia. "After deciding on SalesLogix, they walked us through the entire implementation and were accessible throughout the process. They were on time, good at explaining the technology and always available to answer our questions."

Solutions

After consulting with Technology Advisors and beginning the implementation process, Intelligentsia began to identify clear business solutions resulting from SalesLogix. These solutions helped the company realize new levels of efficiency through accounting integration, the ability to quickly eliminate duplicate information, access essential data, and generate reports and mass e-mails.

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Technology Advisors[®], Inc.
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— Paul Rekstad
National Sales Manager
Intelligentsia Coffee & Tea
on Technology Advisors



Solutions Continued

Integrating accounting and SalesLogix software

Before SalesLogix, Intelligentsia's MAS 200 accounting system and CRM software were not in sync, causing a disconnect between sales personnel and other areas of the company. This made it difficult for the sales team to access crucial client account information for sales calls and other client interaction. The integration of SalesLogix with MAS 200 has brought this information to their fingertips and increased the flow of communication among various departments.

Eliminating duplication in Intelligentsia's sales process

The sales team used to have to enter data once upon initial contact with leads and then again once the lead became an account. This led to an excess of identical information. Now, SalesLogix automatically exports prospect information once they become customers.

Accessing information more efficiently

SalesLogix has allowed the Intelligentsia sales force to quickly access a larger amount of information, which has allowed it to better identify opportunities for cross-selling, up-selling and making sure all potential issues are resolved before going on appointments with customers.

Quickly generating reports and streamlining the sales process

SalesLogix allows the Intelligentsia sales team to easily create reports, as well as perform other tasks such as mail merges and e-mail blasts to send customer updates.

Partnership Advantages

Intelligentsia was pleased with the Technology Advisors' knowledge of the product and accessibility throughout the installation process. Technology Advisors had a clear understanding of SalesLogix and CRM in general, providing step-by-step guidance. The company helped Intelligentsia successfully incorporate SalesLogix into the business through its effective strategy of selecting the right enabling technology, implementing and integrating the technology, training and motivating personnel and supporting the organization's use of enabling technologies.

Real Business Results

Before implementing SalesLogix, Intelligentsia was using a CRM system that was not doing its job. Instead of making life for the sales team easier, it was posing unnecessary complications that actually resulted in slowed down processes, as the team did not have access to critical accounting information. This made it difficult for the team to work to the best of its ability.

Working with Technology Advisors to implement SalesLogix has addressed this problem, allowing the Intelligentsia team to access information and generate reports with ease. Integration with the company's accounting system solidified the availability of important information the sales team can use to consistently make sure they are up to date on client status. Before, multiple departments - from sales to technology to training - had to coordinate for a sale, slowing down the entire process. Now, SalesLogix can notify all of these departments simultaneously when a training day is scheduled.

"Since our accounting system and SalesLogix have been integrated, it has been much easier for the sales team to access invoice history," Rekstad said. "For example, the service manager can be on a laptop without Internet access and use the system to find the information he needs."

Rekstad said he anticipates SalesLogix and Technology Advisors will continue to be assets to Intelligentsia as it makes its way to more users in the company and the team discovers additional functions to help streamline business processes.

"It's going to become an even more useful tool as time goes on and additional people in our company start using it," he said. "It's very robust - more so than other systems I have used in the past."

"Having a solution built on an industry standard SQL® database made a significant difference. We can now integrate other systems to SalesLogix, something we couldn't do with our previous application."

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