



World Investor Link

WILink Ltd is part of the WILink.com PLC. It currently assists over 1.4 million registered users worldwide to attract, inform and understand their investors, and helps industries to make better-informed business decisions. WILink's clients and portfolio of products are extensive and complex. Recent acquisitions by WILink have heightened this complexity. To ensure consistency and efficiency in the management of its clients, the Company decided to standardize on GoldMine 5.5 FrontOffice. This has involved some migration from Contact2000.

"Inaport was the answer to all our problems! Not only could it overcome the difficulties that were jeopardising the implementation, its use of SQL queries to preview results really helped ensure that the import process ran smoothly and as expected," states Adrian Prince of WILink. *"Inaport has proven a most valuable tool for WILink, and is used daily to populate and update the information in GoldMine. I have found Inaport easy to use and would recommend it to anyone as an essential GoldMine maintenance tool."*

Outcome

A preset routine that consolidates activity information on a daily basis and uses this to ensure that the product and client status is automatically updated helps WILink close the gap in client tracking. WILink sees Inaport as an important contributor to this ongoing process.

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Business Need

WILink Ltd. has had a challenging six months migrating a complex client database from Contact 2000 to GoldMine 5.5 Front Office. A critical element for success rested on the ability to import all company and contact details, as well as the full set of pending and historical actions from Contact 2000 and their in-house data management systems. This was initially tackled with an older importing product, without success. Following several months of frustration, Inaport was acquired and has since allowed WILink to achieve its primary objectives. The Company is now concentrating on optimizing and tuning the use of its GoldMine System to support and strengthen its client service management.

Following the successful implementation of GoldMine in the US, Adrian Prince was charged with managing the implementation in the UK and unifying the US and UK installations. Adrian, a Senior Data Analyst, soon appreciated that importing from the current systems was critical for ensuring the correct prospect and client information would be available for the sales-led organization.

GoldMine Solution

A traditional third party product was purchased to meet this import requirement, however Adrian quickly discovered that this was not going to meet his needs. Differences in case sensitivities greatly hampered imports - notwithstanding Adrian's skill and creativity. For several months it appeared that ongoing use of GoldMine would be limited by the problems being faced.

Then Paul Redstone from Solica introduced Adrian to Inaport, at that point a relative newcomer to the market. The evaluation copy of Inaport soon convinced him that it would meet their needs. Adrian was pleased to find that Inaport also manipulates existing GoldMine data. Another challenge was to overcome the mismatch between activity updates and status updates.

Inaport has enabled Adrian to close this potential gap in the client tracking. A preset routine consolidates activity information on a daily basis and uses this to ensure that the product and client status is automatically updated. Activities and status are now kept in synchrony. WILink continues to build on the capabilities of GoldMine to strengthen and support sales management in this demanding and complex market. Adrian sees Inaport as an important contributor to this ongoing process.