

## Clients Talk



### ***The CRM Administrator of a major Health Insurer talks about improving sales processes and gaining unexpected benefits after moving from the SalesLogix Wizard to Inaport for importing marketing leads into SalesLogix.***

"Our Company relies strongly on SalesLogix to manage our sales and marketing process, and to provide our clients with the best possible service. Information relating to current and prospective clients is consolidated in SalesLogix from various sources, so reliable and accurate data importing and exporting is imperative.

Prior to using Inaport we were using the SalesLogix wizard to import marketing lists into SalesLogix. These lists were used to generate mailings that asked recipients to call or return business reply cards for further information. Calls were dealt with by our sales personnel who could quickly find the enquirer on-line in SalesLogix. The business reply cards were sent to our mail house which mailed literature to respondees and then forwarded a file of their details to my department for importing into SalesLogix.

Unfortunately, we could not import information from the mail house without creating duplicates. The SalesLogix wizard created a new client record for every lead imported resulting in many entries for one client. To deal with this problem we had staff spending several hours each day identifying and flagging duplicate records however, due to government regulations regarding record retention, we were not allowed to actually delete the duplicates.

To at least remove duplicates from general access I would call up flagged duplicates and realign their territory by changing the record ownership to "Park", a team with no members. The contents of "Park" could only be seen by me, the Administrator, and I was able to "unpark" records as and when needed.

Although this workaround was effective the entire process was extremely time consuming and labor intensive. Also, as territory realignments cause a slowdown in SalesLogix performance, duplicates had to be dealt with off-hours, in the evenings, or on weekends. Clearly, a better solution was needed.

Our SalesLogix Partner, CustomerFX, introduced us to Inaport and recommended we use it to improve the overall data movement and data management process for SalesLogix. We used Inaport to import the initial marketing list as well as the client file from the mail house. Inaport identifies matching records and only imports changed details – for instance, client updates such as change of address.

In addition, Inaport can be used to automatically schedule actions and update client statuses. Now, we can automatically schedule phone calls for the sales representatives, as well as flag clients (or groups of clients) for specific actions such as “do not call”. The entire the sales management process has become more automated, tightly directed, and successful.

Inaport was easy to install, straightforward to use after our two hour training session, and paid for itself with the first project. We are delighted with the results we achieved and the automated new processes we have introduced. As an added bonus, however, Inaport has also proven useful in entirely unexpected ways.

While using Inaport to import purchased marketing lists I discovered I had failed to populate a field that turned out to be critical. This field contains the last name of the contact in upper case. It's only used during a mail merge to determine the printing sort order for all mail merged letters. This quickly became an issue as staff sending out the literature had to stop and re-sort all the letters in order to match them to mailing labels and brochures.

Inaport gave us an easy fix to this problem. I created a query to find all leads and contacts without a value in this field, and exported the results of the query. I then used Inaport to update the records, import the records back into SalesLogix, and to repopulate them with the correct details. Around 500,000 client records were fixed in this way.

More recently, we were excited to realize that we can use Inaport to purge obsolete records from prior campaigns. Because of Inaport's breadth of functionality, whenever a CRM data challenge arises, Inaport invariably provides a solution. It has already paid for itself many times over.

In summary, we have saved both time and money through the use of Inaport, and have been able to introduce more efficient and effective sales processes. Inaport continues to provide solutions to new and unexpected problems as they arise, and it has undoubtedly been a very worthwhile investment for our organization.”

**INDUSTRY:** Health Insurance Industry

**INSTALLED:** January 2010

**KEY USE:** Duplicate avoidance; importing marketing leads from various sources

**STATUS:** Daily lead imports; ad hoc data cleaning as needed

**Partner:** [www.customerfx.com](http://www.customerfx.com)