

Clients Talk



A pharmaceuticals manufacturer uses Inaport's Relationship Tree Builder to move to an account-centric approach for better customer service and management.

InfoSpectrum's client had a problem. It was using GoldMine to manage clients and the sales process, but was finding it difficult to view customers from an account perspective.

A large pharmaceuticals manufacturer, this client has a vast, fragmented customer base that includes some very large multinational organisations. Its business opportunities frequently involve many contacts from one company, often in different locations, so being able to view activities and relationships from a customer account perspective is imperative for winning and maintaining business.

Although this client had been using GoldMine for several years, it was frustrated by the lack of overall account visibility. It had a highly structured, opportunity-driven sales process that was underpinned by order history and status details updated daily from the company's AS400. This information, spread across many contacts, needed to be pulled together to track, monitor and manage each sales opportunity.

InfoSpectrum, which has been working with the GoldMine community for over ten years, has used Inaport many times to assist with GoldMine data integration and was one of the first GoldMine Partners to make use of Inaport's Relationship Tree Builder. Inaport was already being used by InfoSpectrum's client to automatically transfer order details from the AS400 to GoldMine, and InfoSpectrum decided to extend its use to building and maintaining GoldMine Relationship Trees.

The first step was to build a relationship tree using Inaport's straightforward point and click approach. The tree was setup by company (identified by a master ID) and then by territory, which was different depending on whether it was a US or non-US location. Next, all records were tagged on the basis of the account master ID and then "attached" to the tree by running Inaport's Tree Building function.

Next, existing profiles for transferring AS 400 data were modified to manage the tree building process. In addition to data transfer, record updating and flagging of history records, profiles were setup to rebuild the Account Relationship Tree following additions, changes and deletions. In this way Inaport automatically maintains all tree relationships.

Gail Darling, who managed the project for InfoSpectrum, was impressed with how quickly the entire project was completed, and found several Inaport features particularly helpful.

“The ability to preview newly built Relationship Trees before populating them with client data is tremendously useful and makes a potentially complex exercise straightforward. I simply can’t imagine building and maintaining organisation charts in GoldMine without the use of Inaport.”

The client now has an account-centric view of prospects that fits with its sales approach and which is maintained automatically and transparently. Inaport has been used to meet a range of requirements for the client – data transfer, status updating and relationship management – and remains in place to assist with further data management tasks as they arise.

Statistics

INDUSTRY: Pharmaceuticals

INSTALLED: 2010

KEY USE: Integration with AS400; auto-management of Account Relationships; auto re-building of relationship tree

PARTNER: www.infospectruminc.com



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