



# SyncSite Delivers A Solution To Bank On For BancorpSouth Equipment Finance

## A Sage SalesLogix Solution



**BancorpSouth**  
Equipment Finance

### Customer Information:

**BancorpSouth Equipment Finance**

### Headquarters:

**Hattiesburg, Mississippi**

### Industry:

**Equipment Financing**

### Web Site Address:

**bxsequipmentfinance.com**

### Software:

**Sage SalesLogix**

**B**ancorpSouth Equipment Finance is a division of BancorpSouth, one of the largest regional banks in the southern United States. The division provides financing to companies in the construction, transportation, marine, aircraft, and other industries relying on revenue-generating equipment.

On average, BancorpSouth Equipment Finance books more than \$200 million in loans and leases each year. What gives this company its competitive edge? The comprehensive customer relationship management solution, Sage SalesLogix, backed by the creative team at SyncSite, Inc.

### Outgrowing Contact Management

Until recently, BancorpSouth Equipment Finance used ACT! by Sage. A stand-alone copy of the contact management software ran on each of the sales representative's laptop computers.

Chris Davis, sales manager at BancorpSouth Equipment Finance, recalls that while ACT! was effective as contact management software, it did not provide the sales management tools he and his team need to actively manage their accounts. "Management had no way to determine which opportunities were open, the estimated value of those opportunities, and what factors were affecting our ability to close opportunities."

### Invest In A Long-Term Solution

At an industry conference, Davis spoke with a participant whose company was successfully using Sage SalesLogix to manage its sales process. Davis decided to learn more.

"I spoke with Sage Software and they recommended SyncSite," Davis says. "I liked SyncSite's approach from the beginning. And I really appreciated the fact that they are local to us and had lots of experience converting companies from ACT! to Sage SalesLogix."

SyncSite was able to transfer the individual ACT! databases to a central drive where the data was then scrubbed and converted into the Sage SalesLogix format. "In some cases we had 10 years of history on the laptops, so this was a big undertaking, but SyncSite handled it well," says Davis.

### Gain The Competitive Edge

SyncSite customized Sage SalesLogix to track yield history, such as the historical values of the prime lending rate and treasury bills. This enables BancorpSouth Equipment Finance to compare the rates involved in its loan transactions against these standard indexes. "We use this information to help us remain competitive in tight market conditions," Davis says.

Before Sage SalesLogix, Davis had no ability to query the calendars of his team to check to see what activities they had scheduled and their availability for meetings. Now, Davis has complete visibility into his team's calendars. Reports detail the activities



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"Before SalesLogix I felt like we were purely reactive. We had some reports that gave us basic information, but with Sage SalesLogix we have the tools we need to actively manage our accounts and our opportunities," says Davis.

## Analyze Wins And Losses

Quotes are generated directly out of Sage SalesLogix. SyncSite added a customized Notes Panel where the sales representatives can record their reasoning behind the terms of the quote and the rate offered. "We are better at quoting than we used to be," Davis says. "These efficiencies are making us a stronger company."

When an opportunity is lost, sales representatives can record the details of that loss in Sage SalesLogix. This information is analyzed and used to help improve the close rates of future opportunities. Davis uses the Group feature in the software to analyze and manage the company's sales pipeline. "I create a Group consisting of all the opportunities for the quarter and then I'm able to view the opportunities anyway I want—by representative, by stage, by value, and by probability of close," he explains.

## Go Mobile

Recently SyncSite implemented the Sage SalesLogix Mobile application for BancorpSouth Equipment Finance. This provides each sales representative with the ability to run Sage SalesLogix on their BlackBerry handheld devices.

The sales representatives synchronize their mobile databases with the main database before they leave the office and again when they return. The synchronization ensures the data they have—and the data that management has—is always up to date.

"It's convenient for them to have the customer information with them as they visit customer sites," says Davis. "Our sales reps have really hit their stride using Sage SalesLogix Mobile; it's been a real plus."

## Drive Data Analysis With Dashboards

As a sales manager, Davis depends on current, accurate data

about the opportunities his team is uncovering and the activities in which they are engaged. The Sage SalesLogix Dashboard delivers real-time access to key performance indicators, including sales reporting, marketing campaign effectiveness, and service delivery performance metrics.

The Dashboard helps Davis turn insight into action by allowing him to quickly analyze performance, diagnose potential problems, and identify new opportunities. By providing a single interactive location from which he can view and analyze performance metrics, Davis can keep his finger on the pulse of his busy sales organization throughout the day.

## Return On Investment

Davis says the efficiencies and power Sage SalesLogix brings to the organization have allowed BancorpSouth Equipment Finance to grow its portfolio without the need to hire additional staff. "Our sales reps are more productive because they have all the information they need in their hands. Plus we require less

administrative staff because the sales reps are able to access the tools they need on their own."

## Invest In The Partnership

The decision to invest in Sage SalesLogix has proven its worth, and Davis offers much of the credit for the initiative's success to SyncSite.

"SyncSite was the major reason we decided to invest in Sage SalesLogix," Davis concludes. "With their knowledge, foresight, and development skills they were instrumental in the success of this project. I place a high value on the working relationship we have with the SyncSite team—the company benefits every day from our relationship with SyncSite."



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SyncSite is a premier provider of Customer Relationship Management (CRM) and Business Intelligence (BI) solutions. Our products and services allow companies to target opportunities that drive business, improve efficiencies, and positively impact the bottom line.

Our strategic, consultative approach to every project ensures a successful implementation that delivers tangible benefits from the start. Combining a high level of technical expertise, superior product knowledge, practical business experience, and proven deployment methods, SyncSite successfully enables companies in a variety of industries to manage their client data and leverage this information to enhance profitability and strengthen customer relationships.



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