



SyncSite Delivers Solution That Goldleaf Financial Solutions Can Bank On

A Sage SalesLogix Solution



Customer Information:

Goldleaf Financial Solutions

Headquarters:

Brentwood, Tennessee

Industry:

Technology Solutions Developer

Web Site Address:

www.goldleaf.com

Software:

Sage SalesLogix

Goldleaf Financial Solutions develops, sells, and supports a complete package of advanced technology-based solutions specifically designed for community financial institutions. From Web site development, to document management systems, to the very software used to manage customer accounts, Goldleaf Financial Solutions is the go-to company of choice for the nation's smaller independent banks. To equip its nationwide sales and marketing teams with the tools they need to reach customers and prospects across the country, Goldleaf Financial Solutions chose SyncSite and Sage SalesLogix.

"We'd tried contact management systems such as ACT! and Goldmine, but they weren't robust enough to handle our remote access requirements," says Guy Edwards, senior vice president and director of technology for Goldleaf Financial Solutions.

As the company researched customer relationship management (CRM) solutions, it analyzed both Salesforce.com and Sage SalesLogix. "We chose Sage SalesLogix primarily because it allows our team to work offline and then synchronize whenever they have Internet access," Edward says. "With Salesforce.com you have to be connected in order to work."

Balanced Partnership

Edwards says he viewed an online demonstration of Sage SalesLogix and liked what he saw. Sage Software then referred him to SyncSite. SyncSite is a premier Sage SalesLogix business partner

with offices across the Southeast.

"SyncSite looked to be a different kind of vendor," recalls Edwards. "It is clear they know the product really well, yet they are also experienced businesspeople who understand what real-world businesses need. Everyone we've dealt with at SyncSite is credible, experienced, and has a 'get it done and get it done right' attitude I appreciate."

Edward describes the implementation time

line: "We were going to have all 60 of our remote sales representatives in town for a national sales meeting in four months. We told SyncSite we wanted the software live for that meeting. They got it done on time—including the customizations we specified."

Tailor Your Workflow

Due to its wide range of product offerings, Goldleaf Financial Solutions' sales force typically specializes in a particular product line. The information each representative tracks, and the way they

wish it to be presented may vary. SyncSite was able to tailor Sage SalesLogix to each salesperson, providing each with the precise information they need to be most productive and efficient.

Leads are entered into Sage SalesLogix by the company's marketing department. They are then routed automatically to the sales representatives assigned to that territory. The representatives then make contact with the prospects, and if there is an interest, they initiate a sales cycle in Sage SalesLogix that tracks the opportunity



Robust remote access and synchronization capabilities enable Goldleaf's staff to work anywhere, anytime.

through the various stages in the sales process. Management has full visibility into the sales pipeline and is able to determine at a glance how many leads are in what stage.

SyncSite configured alerts that notify staff of important events and changes in the database. For example, when a completed sales contract is returned, e-mail messages are generated to the contracts department staff and to the accounting staff alerting them to perform their respective tasks. When an opportunity reaches the final steps in the sales process, an automated alert is sent to the implementation team, so they may begin scheduling the new assignment. "We started off thinking of Sage SalesLogix only as a sales tool. Once we began using it, however, it spilled over into a true CRM solution," notes Edwards.

Goldleaf Financial Solutions uses the Sage SalesLogix Library to store marketing literature, technical documentation, and contract templates. "Having this information in one centralized location means that everyone is always working with the latest version," explains Edwards. "It ensures we're consistent with the documentation we deliver to our clients."

Find Your Sweet Spot

The marketing department has come to rely on Sage SalesLogix as well. Campaigns are launched, managed, tracked, and fine tuned using the tools provided with the software. When lead databases, procured for a list of targeted SIC codes, are imported into Sage SalesLogix, the leads are divided up automatically between the company's sales representatives.

"We're able to identify precisely how much we've spent on a campaign and how much revenue has resulted," says Edwards. "Our return on investment is insight. We have an understanding of our customers and where our business is coming from

that we didn't have before." That understanding, says Edwards, boosts the company's effectiveness. "We're tracking demographic information about our clients, and using that information to find our sweet spot."

Flawless Remote Synchronization

It's the seamless synchronization that Goldleaf Financial Solutions has found most valuable. Each sales representative is given a subset of the master database that relates to his or her territory. The representatives are able to work with their databases offline, and when they connect to the corporate server over the Internet, the synchronization takes place in the background, allowing them to continue working uninterrupted. "I admit I was skeptical about the remote synchronization," recalls Edwards. "We'd tried it with Goldmine, and it just wasn't reliable. But this is a rock—they've got it down. It works flawlessly every time."

Edwards also appreciates that the application has the same look and feel, whether accessed remotely by the sales representatives or locally by the home office staff. "That's a big technical support benefit," he says.

Invest In The Future

"We keep returning to SyncSite to help us with additional projects," says Edwards. "It hasn't occurred to us to look anywhere else—they continue to do a great job for us."

Goldleaf Financial Solutions is now working with SyncSite to integrate the Sage SalesLogix Customer Service component with its call center software.

"SyncSite is helping us leverage our technology investment," concludes Edwards. "And it's paying off for us."



With SyncSite's involvement, Sage SalesLogix has evolved from a sales tool into a true customer relationship management solution.

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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