

BroadReach Partners Improves Data Quality with Oncontact CRM

Outsourced business development company employs CRM solution to build sales pipeline for customers



In today's sales world, without a high performance team to develop new relationships and opportunities, few firms can survive, let alone grow. BroadReach Partners Inc. specializes in working with firms that have highly consultative, relationship-oriented selling approaches to increase client sales and decrease cost of sales. Through a unique program of sales pipeline development, prospect nurturing and integration with field marketing, the firm enables its clients to close deals faster and chase fewer stray leads.

Challenges

- Needed a solution to better house details surrounding conversations, phone calls and outgoing emails.
- Needed a highly customizable database to integrate with Microsoft SQL Server

Solution

BroadReach Partners utilized Oncontact's toolkit to customize everything from minor tweaks to major enhancements.

Employees can view all historical information allowing them to see the communication that leads to the contact's current status.

Results

- The quality of BroadReach Partners's data has improved immensely.
- Oncontact CRM allows the company to work in one area without interfering with the whole application
- Dropdown menus and predefined field formats ensure the correct data is entered into the correct field.

BroadReach Partners works with more than 25 sales teams in a variety of fields. Employees make outreach to their client's key prospective customers to organize pre-qualified meetings in order to maximize the potential of securing a new customer. To gain and maintain these leads and execute flawless meetings, it's crucial for BroadReach Partners to have a strong customer relationship management (CRM) solution. However, prior to 2006, the company realized that its CRM system was outdated and did not provide the customization and reporting functions needed.

In search for a new solution that could better house details surrounding conversations, phone calls and outgoing emails, BroadReach partners realized that it also needed a highly customizable database that could integrate with Microsoft SQL Server. In addition, it was important that the solution allowed the company to create more efficient reports by extracting them through the database rather than having to run the reports through Microsoft Access. After an extensive search, BroadReach partners implemented Oncontact Software's Oncontact CRM.

"Oncontact CRM has the feature set and the flexibility we were looking for," said Christian Hollstein, senior database administrator, BroadReach Partners. "The program's high-level of customization and the fact that the database runs in-house was ideal."

Customized to Fit

To tailor the solution to meet its needs, BroadReach Partners utilized Oncontact's toolkit to customize everything from minor tweaks to major enhancements. To date, BroadReach Partners is on its ninth customization release with Oncontact.

"It was attractive to look at Oncontact, set a direction and work with the developers to customize it to fit," said Hollstein. "We were able to develop 90 percent of the customization ourselves and then work with Oncontact's team to help us fill in the remaining pieces."

Key customizations BroadReach Partners implemented include a new history tab that resides behind a potential lead's status field. Now, employees can view all historical information allowing them to see the communication that lead to the contact's current status. This significant component provides employees with more visibility and enables them to troubleshoot issues more efficiently.

“We are very satisfied overall and are extremely happy with the program and the level of customization it provides.”

- Christian Hollstein,
Senior Database
Administrator
BroadReach Partners

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Furthermore, the company added a time zone function to the system as well. Now, when a qualified lead appointment is booked for a client, there is a field requiring the user to indicate the time zone. This is extremely important since BroadReach services clients internationally. Prior to a lead appointment, BroadReach can now create an opportunity sheet for a client with all the vital meeting logistics including the meeting's time zone. This has helped eliminate time zone confusion, allowing clients to book their flights for meetings accordingly.

Improved Data Quality

Since implementing Oncontact CRM, the quality of BroadReach Partners' data has improved immensely. With its previous solution, the fields were not standardized, leaving employees with a great amount of leeway when inputting critical data. In turn, employees could overlook certain fields or use them for purposes not intended, such as entering an email address where a phone number should reside. Now with Oncontact CRM, dropdown menus and predefined field formats ensure the correct data is entered into the correct field.

"With Oncontact CRM, we now have the proper fields available to house all data needed, and it is easy to create additional fields if necessary," added Hollstein. "Our data quality has improved greatly, and we are confident knowing that we are sending the most up-to-date, accurate data to ensure our clients' needs are met."

Multiple Clients One Standardized Platform

The fact that Oncontact is modular is also extremely important for BroadReach Partners. The program allows the company to work in one area without interfering with the whole application. This is important because at BroadReach Partners, each client has unique needs resulting in different requirements for each client.

With Oncontact CRM, the company creates a separate database for each client, but all databases run on the standardized Oncontact platform. This allows BroadReach to tailor the system to adhere to the specific needs of each client. For instance, some clients require unique export files. Now BroadReach Partners does not have to rely on a generic report, and can create the document as requested by the client without interfering with any other client's reporting functions.

"We are very satisfied overall and are extremely happy with the program and the level of customization it provides," concluded Hollstein. "We have really improved our shared information throughout the company which is something that we have never been able to do in the past."