

Wisconsin Family Business Forum Improves Local Business Relations Using Oncontact

Organization uses Oncontact CRM to successfully manage thousands of contacts on a daily



The Wisconsin Family Business Forum, a unit of the University of Wisconsin Oshkosh, is a community that shares its values, experiences and commitment to family business. The mission of the organization is to foster healthy family business through education, information, networking, research and life experience. It enables business owners, family members, non-family employees, business professionals and academics to come together to explore the challenges and rewards of family enterprise and to grow knowledge, skills and experience.

To operate successfully, it is critical for the Wisconsin Family Business Forum to continuously develop and maintain successful relationships with local businesses. The organization must ensure that members and prospects are continuously informed and up-to-date regarding news and events. To do so, the organization built a database using Microsoft Access and input thousands of family and other local business contacts related to the University of Wisconsin Oshkosh College of Business. However, as time went by, the staff realized that the database did not contain the tools needed to consistently keep in touch with all contacts.

"While using our Access database, we weren't always able to execute the intended follow-up items and did not have the functionality to document detailed notes, link messages and track all of the information that we would like to," explained Sue Schierstedt, executive director, Wisconsin Family Business Forum. "We decided we needed a CRM solution that would provide us with a consistent 360 degree view of our contacts and enable us to proactively meet their needs."

Building Stronger Relationships

Schierstedt was charged with finding a CRM solution that would complement the needs of both the Wisconsin Family Business Forum and the College of Business. After reviewing numerous software solutions, she found that Oncontact Software's Oncontact CRM contained the functionality and flexibility needed to improve community relations. More specifically, it had the ability to track and record all correspondence and link to specific documents. Further, the fact that the solution was affordable and could run on the organization's existing platform made it the ideal choice.

"Oncontact Software met our needs in many ways," said Schierstedt. "It's very user-friendly and had the features that we only dreamed of in terms of managing our customer relationships. It was also very good that it ran on our platform so we didn't have to go out and buy a huge new system to implement it."

The organization uses Oncontact to document and record correspondence including phone calls and emails with local businesses as well as log company-specific information and detailed follow-up items. The staff now has the vital information for each business on hand when needed. Further, since implementing the solution, the staff at the Wisconsin Family Business Forum is confident that they will follow up with all of their contacts and send the appropriate information promptly. This is because Oncontact CRM prompts users on a daily basis to complete all follow-up, ensuring that "to-do" items will no longer slip through the cracks.

"With Oncontact CRM, we now have much better relationships with the businesses we work with," added Schierstedt. "There are only two of us in the office and we are able to successfully manage thousands of records. We love Oncontact, it's wonderful!"

Challenges

- Needed to develop and maintain successful relationships with local businesses
- Needed a solution that would complement the needs of both the Forum and the College of Business

Solution

After reviewing numerous solutions, Oncontact Software's Oncontact CRM contained the functionality and flexibility needed to improve community relations.

Results

- Oncontact CRM records correspondence including phone calls and emails.
- Staff had vital information for each business on hand when needed.
- Oncontact CRM prompts users on a daily basis to complete call and 'to-do' items

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- Sue Schierstedt
Executive Director
Wisconsin Family
Business Forum



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Keeping Local Business Better Informed

To keep its members and prospects informed, the Wisconsin Family Business Forum distributes its newsletter year-round. It also sends out a variety of letters and materials pertaining to specific businesses. With Oncontact CRM, the staff can now send out business-specific mailings with relative ease. Previously they had to sift through thousands of entries, mark each individual contact and run a special query. This process was extremely detailed and time consuming. Now, the organization can easily create separate mailing lists and create labels on-the-spot.

"Sending out mailings used to be a lengthy process that required multiple steps," explained Schierstedt. "Using Oncontact offers us the flexibility to assign different lists making it much more convenient and effective to ensure that each business receives the right materials."

Collecting the Right Information

The College and the Forum implemented Oncontact CRM simultaneously by integrating data from many disparate systems. While they both have common contacts, they each have unique data and needs. The Wisconsin Family Business Forum created customized screens and tabs to make the solution truly its own. It has implemented special tabs prompting users to collect the critical information needed to efficiently work with each business. For example, the staff is now able to track how each company participates in the organization and can log information such as whether they are a part of a peer group, a member of the board or on a specific committee. Further, a tab was created to track some of the key differentiators that successful businesses possess, such as whether or not it has an advisory board. Other information that is mandatory includes, the founder of the company, the year it was founded and how many family members are currently involved. The ability to have this detailed information in one central location enables the Wisconsin Family Business Forum to understand and meet each business' specific needs.

"Dealing with family businesses, we require unique information to be tracked," said Schierstedt. "Customizing Oncontact CRM enables us to ensure we log the essential data needed to be productive and well organized."

Privacy for All Members

A majority of the data logged into Oncontact regarding various family businesses is confidential information. The College of Business also utilizes Oncontact CRM to track personal and financial data for its MBA students that is federally required to be protected. It is critical that users who work in specific departments only have access to the information that pertains to them. Oncontact CRM enables the administrator to provide users only with the access needed to perform their job in order to protect confidential information.

"The ability to assign rights and restrict access made Oncontact very attractive to us," added Schierstedt. "We deal with a lot of confidential data, and it is very critical that others using the system on campus do not have access to the private family business information that resides in the system."

Growing with the Wisconsin Family Business Forum

To date, the Wisconsin Family Business Forum is very pleased with the technical and sales support it has received from Oncontact.

"We really like Oncontact," said Schierstedt. "The support staff has always been fantastic. The key to any successful software product is to have great functionality and support. Oncontact has both."

Further, the organization is looking to upgrade to the latest version of Oncontact's solution, Oncontact CRM 6.3. The upgrade is ideal because it enables users the flexibility to access data in the system using a web browser, the local network, or syncing it to a mobile device. This will ensure all users have the information they need no matter where they may be.

"Overall, I feel that Oncontact Software is very focused and passionate about continuously developing Oncontact CRM," said Schierstedt. "The new features offered in the latest version are ideal for our growing business needs."