

West Business Services Meets Customer Needs with Oncontact Software

Sales solutions company creates customized database for more than 100 clients with Oncontact CRM



About West Business Services

West Business Services delivers business-to-business sales solutions to companies in the healthcare, small-to-medium sized business and consumer products markets. The organization helps its clients drive incremental sales, increase revenue and strengthen relationships through an integrated suite of customized solutions including lead management, sole territory coverage, team selling and account management. With more than 100 client partners, its mission is to support every client with a dedicated inside sales team to move the sales process forward to close business deals.

Challenges

- Needed a solution to drive sales, increase revenue and strengthen relationships
- Support more than 100 client partners
- Needed a customizable CRM solution

Solution

Oncontact CRM was selected for its flexibility and customization capabilities.

Results

- Increase productivity and efficiency
- Able to integrate Oncontact CRM with its phone platform to log calls and enable users to fax using the system
- Achieved cleaner and more accurate data

Because West Business Services regards its business relationships as a top priority, it is fundamental for the company to have a successful customer relationship management (CRM) system to provide each client the best service possible. Previously, West Business Services implemented a CRM solution to optimize its sales, marketing and customer service strategies. However, the company outgrew the system very quickly.

"In our business, it is critical for us to meet each client's unique challenges," said Scott Krueger, senior director, IT, West Business Services. "After outgrowing our first CRM solution, we realized that we needed a system that could provide the customization and flexibility necessary to meet the demands of our diverse clientele."

Searching for the Best Solution

To ensure the organization selected the best solution to meet its needs, West Business Services sent out a request for proposal to all of the leading CRM companies in the industry. West Business Services then hosted a bidder's conference where each company sent a representative to present their solution. The solutions were narrowed down to the top three technologies with Oncontact Software's Oncontact CRM emerging as the winner.

Oncontact was ultimately selected for the flexibility and customization opportunities it provides West Business Services. Also, the company enjoyed the fact that Oncontact was introduced with a strong recommendation from the reseller that sold the company its previous CRM solution.

"We liked the fact that Oncontact showed true dedication to helping us automate and improve our business processes," added Krueger. "Software from the larger CRM companies was more rigid and difficult to configure. Oncontact offers a total solution with the flexibility and customization we required."

Tailored to Fit

West Business Services utilizes Oncontact CRM to manage virtually any client related tasks including sales, customer service and complaint handling processes. The system is distinctive because the company has created a customized, separate Oncontact database for each of its clients to provide tailored support and optimal client service.

"The company has provided us with the flexibility needed to further increase sales and generate new growth opportunities."

- *Scptt Krueger*
Senior Director, IT
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West Business Services customized the solution heavily creating screens which includes a scripting platform to provide associates with an up-to-date script at all times. Oncontact CRM also allows users access to decision trees within companies to find out a person's job, title, role within the company and who they report to, before making outreach. This enables the staff to contact the proper person depending on the initiative.

"We customized Oncontact CRM to truly meet the needs of each of our clients," said Krueger. "It is refreshing to have a solution that allows us to change existing screens and develop our own at a moments notice."

Clear Visibility

West Business Services has increased both productivity and efficiency, a direct result of the visibility Oncontact CRM offers users. Now, all client attributes and activity are logged in the database offering associates an enhanced and concise view of customers. With this detailed information, associates have the tools to more effectively move the sales process forward to turn leads into business.

In addition, by implementing Oncontact Software, the company has transitioned from a flat-end solution to a relational-end solution, meaning other business process can be integrated to create a total solution. Because of this, West Business Systems was able to integrate Oncontact CRM with its phone platform to log calls and enable users to fax using the system. Further, when inbound calls are received, users can automatically see information including the name of the caller, the latest correspondence, what marketing collateral the caller has received and other vital information on the spot. Associates are now always prepared to handle inquiries effectively and communicate the proper messages to each caller.

"The integration Oncontact provides further allows us to be a seamless extension of our clients' organizations," added Krueger. "By combining these functions we now have the methodologies and technology needed to provide our clients with guaranteed success."

A Peak into the Future

Beyond improving business productivity and efficiency, West Business Services has also achieved cleaner, more accurate data. The company is now able to read past behavioral patterns and predict what is going to happen in the future based on business intelligence and predictive analytics which was previously impossible without Oncontact's infrastructure.

"It is a pleasure to work with Oncontact," concluded Krueger. "The company has provided us with the flexibility needed to further increase sales and generate new growth opportunities. I appreciate the relationships and the support that I have always received from the Oncontact support team."