

The Orchard Learning Group Improves Customer Service with Oncontact Software

Educational software publisher uses Oncontact CRM to gain complete visibility of customer accounts

Challenges

- Needed to streamline business processes
- Unable to address customer needs on a full scale.

Solution

Oncontact CRM was easy to use and implement and could meet their business and budget needs

Results

- Oncontact CRM was able to integrate with Orchard's accounting software.
- Orchard Learning Group was able to customize the software to meet their business needs.

The Orchard Learning Group, an educational software publisher, designs programs that teach reading, language arts, writing, math, science and English as a Second Language (ESL). The software can teach students ranging from kindergarten through adult. Its software is intended to motivate students to master key skills and concepts that are stressed on standardized tests and in textbooks.

As the company began to grow rapidly, the Orchard Learning Group decided to search for a customer relationship management (CRM) solution. It needed an encompassing solution that could streamline business processes and provide complete visibility to each customer in order to provide the best customer service possible. At the time, the company was using a variety of programs for customer service initiatives - a contact manager program for the inside sales team, a technical support interface for the tech group and a separate accounting system. Because these programs could not integrate across departments, employees had limited access to information for each customer. In turn, employees were unable to address customer needs on a full scale.

"We sought a CRM solution to gain complete visibility to all of our customers," said Jo Gunnett, inside sales manager, Orchard Learning Group. "It was frustrating to have limited account information and not be able to respond quickly to every aspect of a client's account. It was clear that our team needed instant access to cross-departmental information in order to operate efficiently, provide excellent customer service and maximize sales opportunities."

Finding the Right Fit

Orchard Learning Group researched a variety of CRM solutions and found that many either lacked the functionality needed or were too expensive. However, through an online search, the company discovered a solution that was easy to use and implement, and could meet both their business and budget needs. The solution was Oncontact Software's Oncontact CRM, a system focused specifically for the mid-market. The system could enable Orchard Learning Group to automate its critical business information while increasing productivity and reducing costs. Furthermore, because the solution was intuitive, it could enable users to transition with ease.

The company implemented Oncontact CRM in 2004 and was pleased with its ability to house critical account information such as products owned, technical aspects, unresolved issues, sales opportunities and other information in one central screen. Orchard Learning Group was also pleased that it only needed to make minor modifications in order to use the solution immediately.

"Oncontact CRM allows our staff to be proactive in managing successful relationships rather than being reactive," added Gunnett. "With many CRM solutions, it's often necessary to implement an extensive amount of customizations upfront, which can be a daunting task. With Oncontact Software, we had a great project manager that walked us through the minor modifications needed to get the system running and performing exactly how we envisioned immediately. It was a huge help."

“With Oncontact CRM, we have the ability to attribute a dollar amount to each campaign. It enables us to determine if we achieved a return on investment.”

- Jo Gunnett,
Inside Sales Manager
Orchard Learning Group

Improved Relationships through Visibility

Now, the inside sales team uses Oncontact CRM daily in order to manage existing customers and prospects. Employees use the program to determine what customers need to be contacted and then create a daily schedule of calls to ensure that time is spent efficiently. It is also used to identify and track potential sales opportunities and as a forecasting tool to gauge sales performance.

Further, if an existing customer has a technical issue, the account is transferred to the technical support group. However, using Oncontact CRM, the sales team now has full access to all data residing within the technical support group to be able to identify any issue and its current status. This has significantly reduced the amount of time the sales and technical teams spend cross calling just to figure out the active status of an account. Now, employees can speak intelligently to customers regarding any aspect of their account on the spot.

"Oncontact CRM provides our representatives with the critical information needed to identify and resolve any account queries quickly and efficiently," said Gunnett. "Our customers appreciate the enhanced service level and the fact that their questions can be answered immediately. Further, the increased visibility has enabled us to grow both our relationships and sales."

Customizing the Solution to Grow the Business

After the initial implementation, the Orchard Learning Group designed additional customizations to further complement its business processes. Because the company has five product lines, each containing more than 160 programs, it was previously impossible to quickly identify the products a customer owned while on the phone in order to up-sell. To make the information readily available, Orchard Learning Group was able to integrate its accounting software with Oncontact CRM. Now, representatives have the ability within 30 seconds of speaking with a customer to identify the areas that they can potentially add sales.

In addition, Orchard Learning Group customized the association tab in order to connect each school with its district and the appropriate contacts. The company also created a demographic tab which includes information such as the grade levels of each school, the beginning and end date of the school year and funding information. This information helps employees identify opportunities during the sales process. A sales history tab was also created to display a complete history of each customer's invoicing. This was a big improvement for the company as its previous solution lacked the ability to log a sales history or integrate with other systems. Lastly, Orchard Learning Group is now able to easily generate customized reports to help manage the sales pipelines and forecasting and ensure business goals are on track.

"Implementing customizations has allowed us to design the solution to meet our exact business needs and integrate seamlessly with our day-to-day work flow," added Gunnett. "Each customization has enhanced our efficiency and provides us with the critical information necessary for success."

Evaluating Marketing Efforts

The Orchard Learning Group also uses Oncontact CRM to track its industry conferences and marketing efforts. Users can document their interaction with customers during a conference and tie a source code to each customer. On a monthly basis, the company is able to correlate sales with source codes to determine what orders were placed based on specific campaigns.

"It's extremely helpful to be able to measure the success of our marketing strategies," said Gunnett. "With Oncontact CRM, we have the ability to attribute a dollar amount to each campaign. It enables us to determine if we achieved a return on investment and also helps us plan our future marketing efforts."

A Dependable Partner

Employees enjoy using Oncontact CRM because it provides instant access to essential account information. "Once employees learn how to use the system, they enjoy the efficiency it brings to their work day," said Gunnett. "It's a program our representatives don't want to be without."

Further, Orchard Learning Group appreciates the support it has received through the years to assist with customizations and general maintenance of the system.

"Oncontact Software is extremely responsive and great to work with," added Gunnett. "Year after year, they continue to make us happy and we really appreciate the service they provide. More importantly, the system performs exactly how we need it to and it enables us to work efficiently, drive sales and keep our customers happy."



For more information:
Oncontact Software
W67 N222 Evergreen Blvd.
Cedarburg, WI 53012
info@oncontact.com
www.oncontact.com