

Going Beyond the Quick Fix Creates Fully Integrated Technology

FIRST IMPRESSIONS

In order to be an effective sales-based organization, customer relationship management (CRM) is a software application that should be used regularly. One en-terpret.co client, which manufacturers molded containers used to ship consumer products, had utilized a basic CRM tool for years. However, given the age of their software product, an upgrade was becoming essential. When the client contacted en-terpret.co, they simply wanted assistance in upgrading their CRM software (ACT). However, what appeared to be a simple software upgrade turned out to be a much more involved situation. The system improvements would best be done on a larger, separate, server and would require an upgrade to the client's accounting software, as well.

WHEN IN DOUBT, TEST IT OUT

After discussing the problem with the client and researching performance and compatibility issues between the two systems, the consultants at en-terpret.co felt it was crucial to conduct a *“pre-conversion test.”* This would help identify CRM application changes that would affect the productivity of the individuals using the program at the client site. It would also ensure the least interruption in usage on the part of the client. After running the application for a few days, it was deemed successful and ready for live conversion at the client's site.

en-terpret.co's TANGIBLE RESULT PLAN

en-terpret.co developed a practical strategy for managing the entire upgrade without significant disruption of the client's current users and systems. After the new server was ordered and installed it was used to test the upgraded CRM application. Once the implementation was to the complete satisfaction of the client, the “live data” was moved to the accounting system. Finally, en-terpret.co took time to ensure that the client was completely comfortable using the newly upgraded programs so that they would not lose any valuable business time during this learning curve.

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In addition, they helped the client gain maximum utilization of the capital expenses in their old server by reconfiguring it to handle email functions in-house. This simple solution afforded a more secure flow of email information, enabling the client to archive and save emails and have a running history of email receipts.

PROBLEM SOLVED

Not only did en-terpret.co solve the client's original problem regarding their archaic, yet vitally important CRM program, the upgraded server allowed the program to operate faster and more efficiently. In addition, because of the speed of the new server, the client is able to use several new applications with their CRM program, which has greatly improved their efficiency. This includes email integration, voice over IP (VOIP) integration and voice messaging.

The accounting system upgrade, which would have been a requirement soon, was also accomplished as a part of this migration. In addition, the possibility of in-house email will greatly increase security and allow the organization a detailed email history. As an added bonus, the new server will allow remote access and Blackberry or other email device compatibility.

THE MORALE OF THE STORY

What the client thought was a simple fix turned out to be very complex. en-terpret.co took the time to develop a strategy and plan for minimized disruptions, which helped to attain tangible results. This implementation will pay big dividends as the client is now technologically well-positioned for years to come with systems and infrastructure that will support their businesses and allow them to continue to grow and be profitable.

