



CUSTOMER SUCCESS STORY

**CUSTOMER**

Heritage Log Homes

**INDUSTRY**

Real Estate

**LOCATION**

Sevierville, Tennessee

**Number of Employees**

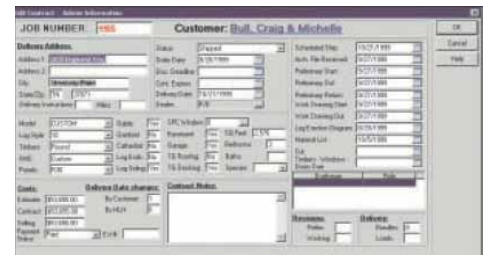
75 employees; 80 independent dealers

**SYSTEM**

Sage CRM SalesLogix

## Sage CRM SalesLogix Helps Build Heritage Log Homes Sales By 24 Percent

Duane Schmitt, the MIS director for Heritage Log Homes, said, "We had 15,000 leads no one was following up on," largely because they couldn't adequately manage the tremendous volume of leads. Heritage was using a contact manager to track its prospects and customers, but business was growing and, as Craig Bull, general manager, noted, "It didn't offer the flexibility to do the things we wanted to do."



While Heritage required a more efficient lead management system, the company also needed to find a better way to preserve the 27 years of data it had accumulated and to eliminate redundant records stored in various databases.

"Not having a central database really hurt us. We could have multiple salespeople working on one lead, with no way of coordinating our efforts or knowing who really owned the lead," said Schmitt.

**Customization is Key**

The team at Heritage began a search for the right CRM solution, looking at several possibilities.

"We chose Sage CRM SalesLogix because it's extraordinarily versatile and we knew we could easily customize it to fit all of our needs," Schmitt said. "With a lot of other systems, you get their front-end and there's not much you can do about it. With Sage CRM SalesLogix, you can build almost anything you want to."

Heritage also chose certified Sage CRM SalesLogix Business Partner Josh Overt, president of Extremely Productive, to implement the solution. Overt and Schmitt began by asking Heritage's salespeople and dealers what they wanted from the system. Schmitt explained, "I sat down with salespeople and dealers early on because

**CHALLENGE**

Heritage Log Homes was losing a potential 15,000 clients because of their inability to follow up on leads. They needed a system capable of integrating data from each department's database.

**SOLUTION**

Sage CRM SalesLogix consolidated 27 years of data from multiple databases, allowing dealers to access customer information via the Web, as well as creating nine views of the database for an assortment of users.

**RESULTS**

Sales increase of 24 percent due to the streamlined efficiency afforded by the SalesLogix system integration and its exceptional lead management system.



Your business in mind.

