



CUSTOMER SUCCESS STORY

CUSTOMER

SEI Investments

INDUSTRY

Global Technology and Investment Services

LOCATION

Philadelphia, Pennsylvania

Number of Employees

1,500 Worldwide

SYSTEM

Sage CRM SalesLogix

SEI Investments Sales Productivity Up Almost 300% With Sage CRM SalesLogix

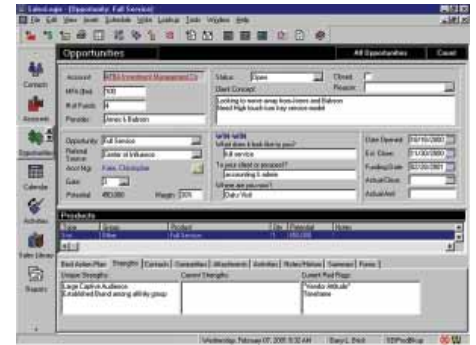
John Yackel had a challenge: create a sales team within the Investment Manager Solutions unit of SEI Investments, a global technology and investment services firm. The team would be responsible for selling strategic outsourcing solutions to the investment management marketplace.

“I knew I would need salespeople and sales processes,” says Yackel, vice president and managing director. “And I felt strongly that we needed a CRM solution that was quickly deployable and would support a highly complex sales process—something flexible out of the gate.”

Flexibility and Usability Required

After examining several solutions, from contact managers to enterprise-size packages, Yackel decided Sage CRM SalesLogix from Sage Software was the right solution.

“We typically offer multiple products and services to an organization,” he explains. “Sage CRM SalesLogix has a design and workflow that more intuitively handles the complexities of that kind of sales process while being highly user-friendly.”



“The question I asked myself was, ‘What will my people use?’ Sage CRM SalesLogix was the answer.”

Another consideration was ease of customization and implementation. To implement their Sage CRM SalesLogix solution, Yackel chose Cotelligent, an authorized Sage Software business partner. He believed Cotelligent could tailor the system to meet his group’s needs and have it up and running quickly.

The timeline was tight, but Cotelligent had SEI’s Sage CRM SalesLogix system ready to use in just 45 days. The system was operational with external data imported, plus both LAN and remote users online and

CHALLENGE

SEI needed a flexible CRM solution that would support its highly complex sales process.

SOLUTION

Sage CRM SalesLogix customized wizards standardized and automated critical functions in just 45 days. Now vital information is shared between front- and back-office systems.

RESULTS

With Sage CRM SalesLogix in place, SEI’s salespeople are now capable of handling nearly three times as many opportunities as they were before.



Your business in mind.

