



CUSTOMER SUCCESS STORY

CUSTOMER

Harbor Capital Advisors, Inc.

INDUSTRY

Mutual fund sales and marketing

LOCATION

Toledo, Ohio

Number of Locations

Two

Number of Employees

76

SYSTEM

Sage CRM SalesLogix

Harbor Capital Advisors Turns the Tide With Sage CRM SalesLogix

Harbor Capital Advisors (HCA) is the adviser and investment arm of a family of 12 no-load mutual funds that offer actively managed portfolios of stocks, bonds, and money market securities with combined assets of approximately \$17.2 billion.

Until recently, HCA Securities, Harbor Capital's broker dealer, had limited marketing activities, primarily with institutions. That changed last year with the creation of an expanded sales and marketing group to build new relationships with broker/dealer channels, 401k, and registered investment advisor markets.

Deb Well, newly hired as HCA Securities' Director of E-Business, took one look at the existing database and knew it needed to be replaced. Well did a comparative analysis and decided on Sage CRM SalesLogix because it could be easily customized for the unique needs of Harbor Capital and HCA Securities.

Smooth Sailing With Sage CRM SalesLogix

"Given our multi-channel environment, I couldn't see going with anything but Sage



CRM SalesLogix," she says. "Our industry is changing at the speed of light—and only Sage CRM SalesLogix gives us the flexibility we need to compete."

Harbor Capital and HCA Securities now use Sage CRM SalesLogix to manage every aspect of their customer relations with potential mutual fund investors. Sage CRM SalesLogix stores information on every sales meeting, phone call, and e-mail, and tracks where a prospect is in the sales cycle. Sage CRM SalesLogix has also automated fulfillment, helping to send quarterly fund information to those who have opted in to its "blast e-mail" programs.

"E-mail is one of the cornerstones of our business, and Sage CRM SalesLogix allows

CHALLENGE

New proactive sales and marketing division required a full-featured CRM tool to replace the little-used Profile database.

SOLUTION

Sage CRM SalesLogix for end-to-end customer relationship management and outbound sales and marketing.

RESULTS

Sales are up this year, thanks in part to Sage CRM SalesLogix capabilities that have the ability to send mass emails using seamless integration with Microsoft Office and Microsoft Outlook and customizable reporting.



Your business in mind.

