



CUSTOMER SUCCESS STORY

CUSTOMER

Eatec Corporation

INDUSTRY

Software Provider

LOCATION

Emeryville, California

Number of Locations

One

Number of Employees

180

SYSTEM

Sage CRM 100

Eatec Corporation Caters to Big-name Customers by Replacing GoldMine® with Sage CRM

For more than five years, Eatec Corporation used GoldMine® for contact and customer management. Through most of that time period, the solution served the company well, enabling basic management of prospects and current accounts. However, as Eatec’s accounts began to grow in number, size, and complexity, users needed more functionality than GoldMine could provide. It was becoming increasingly difficult for them to manage their expanding database of sales opportunities and current accounts, as well as service and maintenance contracts, products/modules in use, and more.

A leading provider of enterprise back-office software and services for the foodservice and hospitality industries, Eatec’s client roster boasts big names such as Applebee’s International, Universal Studios, Madison Square Garden, and Amtrak, as well as several large universities and supermarket chains. To keep these complex enterprises satisfied and loyal, Eatec needed a more robust CRM solution.



Finding the Ideal Replacement

Eatec leadership itemized their functional requirements for a replacement product. First, it would need to be easily customizable. GoldMine had not allowed them to track all of the data and processes that they wanted, so configurability was a must-have. Equally important, the company wanted seamless integration with Microsoft Outlook and remote access without synchronization—two capabilities not found in Eatec’s version of GoldMine.

Eatec also required an account-centered CRM database, as opposed to a contact-

CHALLENGE

To satisfy large and complex accounts, Eatec Corporation needed to transition from basic contact management (through GoldMine® and other applications) to true customer relationship management

SOLUTION

Implement Sage CRM to enable account-centered customer relationship management that includes flexible customization options, integration with Microsoft Outlook, and remote access without synchronization

RESULTS

More efficient sales prospecting and productivity; greater marketing campaign execution and tracking; seamless interaction between sales and marketing through Sage CRM



Your business in mind.

"Sage CRM is a significant improvement for our sales and marketing team. The solution's account focus and remote access, along with its integration with Outlook has made us a much more efficient and effective organization."

—Peter Marguglio
President
Eatec Corporation

ABOUT SAGE SOFTWARE

Sage Software has been responding to the needs, challenges, and dreams of small and mid-sized businesses for over 25 years. With a complete range of business management solutions and services, Sage Software helps companies improve customer relationships, reduce costs, and automate and integrate a variety of operational activities. Its solutions support the specialty needs of a broad scope of industry segments, including manufacturing, distribution, construction, real estate, nonprofit, and professional services.



centered structure. In the past, the company had endured disconnects between contacts because it had been unable to house them under a single account. Salespeople had to use Microsoft Excel in conjunction with GoldMine simply to track which products/modules were in use for their customers. Plus, staff members complained of having to manually update multiple contact records, rather than being able to globally update fields at the account level.

"We knew we'd outgrown GoldMine on several fronts, but the main pain point was not having an account-centered solution. Our customers and prospects are too complex to manage from a contact-focused perspective," said Peter Marguglio, President, Eatec Corporation.

As Eatec began evaluating leading CRM solutions, total cost of ownership became another key factor. Once the product met all functional and technology requirements, Eatec would then calculate price scenarios. Salesforce.com was eliminated because of its ASP model, which would cost too much over time. Other products were ruled out due to technology limitations or because they required additional hardware, such as Microsoft CRM, which must run on Microsoft Exchange Server.

After about one month of analysis, Eatec's decision-makers chose Sage CRM, under the expert guidance of their Sage Software Business Partner. The partner performed a smooth and rapid implementation, migrating 100 percent of the company's data from GoldMine into Sage CRM and customizing the solution, so that its interface and back-end functionality would support Eatec's business processes.

Using Sage CRM to Improve Sales & Marketing

Presently, Eatec's salespeople use Sage CRM primarily for prospecting and tracking every aspect of those interactions. Outlook integration enables a seamless connection for managing email communications with

prospects/customers and facilitating shared calendaring. No longer forced to use multiple applications to maintain and locate information, salespeople get more done faster and are less prone to errors because they're not manually entering data between systems.

Eatec's marketing department takes advantage of Sage CRM in running campaigns and measuring results. With GoldMine, they could broadcast email communications to prospects and customers, but weren't able to track responses. Now, they're tracking recipients and conversion to sales. They also love the ability to print labels one at a time for postal mailings—something they couldn't do with GoldMine.

For Eatec's sales and marketing teams, the Web-based interface for anytime/anywhere remote access proved to be the greatest advantage of Sage CRM. Without having to synchronize from the road, employees can update records and gain access to the central database for real-time information. Everyone is connected through Sage CRM, whether in the office or not.

"Sage CRM is a significant improvement for our sales and marketing team. The solution's account focus and remote access, along with its integration with Outlook has made us a much more efficient and effective organization," said Marguglio.

Sage CRM has streamlined interaction between sales and marketing, as well. Now, when Eatec receives lists from tradeshows or other events, the marketing team imports the lists into Sage CRM to assign leads to salespeople. Salespeople can then track leads based on an account-centric view, rather than dealing with isolated contact records. Likewise, marketing can track results by account for more comprehensive campaign analysis.

In the months to come, Eatec looks forward to adding Sage CRM customer care capabilities to improve customer service effectiveness and to increase the collective benefits of unifying all customer interactions under a single solution.

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