# Sage SalesLogix Web Client Helps Conferon Grow

Meeting planning may seem simple, but the work that goes into booking facilities, coordinating equipment, and handling staffing to make successful meetings and events is staggering.

That's why many companies turn to Conferon, the nation's largest independent meeting planning company. For more than 30 years, Conferon has flawlessly executed annual conventions, sales meetings, trade shows, special events, and all types of customer-oriented functions.

At double-digit growth rates for the past decade, Conferon needed a way to efficiently manage sales and opportunities, whether they came from an ever-expanding worldwide sales staff, electronically from Web-based leads, or through e-mail requests for proposals. Thus, the search began for a complete CRM solution.

### Data in Disparate Systems

"Conferon's salespeople were keeping track of sales and customers with contact management systems, spreadsheets, and an overburdened DOS-based system," says Wynne Chambless of XBSS, LLC, a Sage Software business partner. "Conferon needed a system that would be easy to deploy and that would allow independent salespeople to use the system on the Web."

"We spent a lot of time investigating solutions and were actually halfway through the buying cycle with another one," recalls David Peckinpaugh, Conferon's vice president of sales. "However, we realized that with the addition of Sage SalesLogix, all our customer-facing systems could be tied together," Peckinpaugh continues. "Our Sant automated proposal system integrates with Sage SalesLogix, and we use DynaLink to interface with our Sage MAS 90 ERP system. You can't imagine how information sharing improves sales productivity and customer service!"

### Up and Running in Just 45 Days

The first phase of the project was to bring Conferon's contact and account management into Sage SalesLogix. "We needed to start there to enable data sharing, which was critical for our success moving forward," Peckinpaugh explains. This phase was rolled out in 45 days, including importing data from multiple legacy systems and several customizations.

**Customer:**

**Conferon**

**Industry:**

Meeting Planning

**Location:**

Cleveland, Ohio

**Number of Locations:**

Worldwide

**Number of Employees:**

200+ employees at corporate headquarters and five regional offices

**System:**

**Sage SalesLogix**

**Sage MAS 90**

**DynaLink for Sage SalesLogix**

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**CHALLENGE**

Conferon was using an outdated system to track its sales, opportunities and customers. It needed a CRM solution with strong opportunity management and the ability to integrate with existing software.

**SOLUTION**

Sage SalesLogix integrated with their Sage MAS 90 ERP system and Sant, their automated proposal system.

**RESULTS**

More efficient and effective reporting, forecasting, and planning throughout Conferon's internal and external sales teams, maintaining their double-digit growth rates.

"We don't have a large IT staff, so XBSS ability to develop and customize has been a huge asset," Peckinpaugh continues. "They have been instrumental in steering us during this process and our relationship with them has been invaluable."

Formal training began with a four-hour session, including laptop setup, workstations, and a tour of Sage SalesLogix. This was followed by two weeks of activities sent by e-mail, giving the reps practical experience using the system. "I think the speed of implementation caught the company off-guard," Peckinpaugh says. "It was nice to surprise them with our speed to market."

**Profound Impact on Sales Force**

Conferon now has 150 employees using Sage SalesLogix via the Web, and that number is continually growing.

"We're quantum leaps above where we were," Peckinpaugh said. "Sage SalesLogix has had a profound impact on our sales force."

"It's been very easy, friendly, and logical for our salespeople. We haven't had to force the system on them. It makes sense to them and matches their workflow. We now have a central source for sharing account information among our account executives, account planners, meeting managers, and our small business department," he continued. "Sage SalesLogix has enabled us to define our sales process, we have a clearer picture of deals in the pipeline and their status."

"Sage SalesLogix has become part of our daily sales process and is a critical tool for our future growth," Peckinpaugh concludes. "Every time we're in a strategic planning session, our thought process immediately turns to integration into Sage SalesLogix. It's one of the best investments we've made."

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