



CUSTOMER SUCCESS STORY

**CUSTOMER**

Aspyra, Inc.

**INDUSTRY**

Software Manufacturer

**LOCATION**

Calabasas, California

**Number of Locations**

Three

**Number of Employees**

125

**SYSTEM**

Sage CRM SalesLogix

Sage MAS 90

**Other Sage Software Products in Operation**

- Sage CRM SalesLogix Support
- Sage CRM SalesLogix KnowledgeSync

## Aspyra Connects Key Areas of Business to Improve Customer Satisfaction

Like so many fast-moving companies, Aspyra found itself running a hodgepodge of applications, which functioned adequately but produced silos of information. The company had several sales prospecting products, a dated helpdesk system, plus the usual gamut of spreadsheets, folders, and documents—in essence, a lot of redundant and inconsistent information.

Aspyra, a global provider of clinical and diagnostic information solutions for the healthcare industry, wanted a CRM solution that would make it easier to keep customers happy, while improving internal effectiveness.

### Selecting the Optimal Solution

Aspyra launched its CRM initiative by compiling a comprehensive requirements document. Among the primary requirements were: 1) to improve sales processes and give management real-time insight into the company’s pipeline; 2) to empower the customer support staff with a robust tool that allowed visibility into customer history; 3) to integrate critical sales, support, finance, and development processes.



Aspyra assessed several vendors, including Sage Software, Pivotal, Maximizer, and Salesforce.com. Aspyra’s Chief Operations Officer, James Helms, says that after a thorough product evaluation, “We quickly settled on Sage CRM SalesLogix because of breadth of functionality.”

Aspyra also put significant effort into choosing a business partner. Helms explains, “We were as diligent in picking a reseller as we were in picking a product. I believe having a partner that will help you through implementation and provide follow-up support is essential.”

**CHALLENGE**

Disparate systems had created silos of information and reduced ability to provide highest quality customer service.

**SOLUTION**

An integrated Sage CRM SalesLogix and Sage MAS 90 ERP solution to connect and improve sales, support, finance, and product development functions.

**RESULTS**

Streamlined and integrated key business processes in sales, support, finance, and product development departments, resulting in smoother internal communications and increased customer satisfaction.



Your business in mind.

*"We quickly settled on Sage CRM SalesLogix because of breadth of functionality."*

—James Helms  
Chief Operations Officer  
Aspyra, Inc.

## 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.



## Achieving a Smooth Implementation

Adhering to a phased approach, Aspyra first installed Sage CRM SalesLogix Sales and integrated it with the company's existing Sage MAS 90 ERP system. This instantly gave the sales organization insight into data such as customers' current products and allowed them to enter orders directly into Sage MAS 90 for seamless, error-free invoicing.

Aspyra also converted its valuable legacy data (prospecting, contact/account info, helpdesk tickets, and more) directly into Sage CRM SalesLogix. After only a few training sessions, the sales team picked up where they'd left off, without losing time updating records or fumbling with new functionality. Even with an entirely remote sales organization, Helms reports that the first phase "went without a hitch."

Phase two included implementing Sage CRM SalesLogix Support and integrating it with Sage MAS 90 to enable visibility into customers' products, maintenance contracts, service level agreements, and more. Helms stresses the value of this connection. "I don't know how we'd operate without this. Our whole business revolves around supporting the things we sell. If we don't have that visibility, we're paralyzed."

Aspyra also defined a set of business conditions that would trigger automatic alerts, particularly in time-sensitive situations such as when support tickets or bug fixes are due. Enabled by Sage CRM SalesLogix KnowledgeSync, the auto-alerts facilitate teamwork across the organization, helping teams meet goals on time and deliver proactive service.

Lastly, Aspyra enabled Sage CRM SalesLogix Defect Management. This component delivers real-time product development info to support reps, so that they can communicate accurate, timely updates to customers.

## Reaping the Rewards

Aspyra is experiencing new efficiencies across the organization. The sales implementation not only streamlined Aspyra's prospecting processes, but also led to the development of a formal sales process. Sales staff can now easily report detailed, up-to-the-minute account status and management can accurately predict revenues—two capabilities that Aspyra formerly lacked.

"We customized the tabs to slice and dice our info, to quickly look at what's forecasted near-term and what's on the horizon. Senior management depends on that window into the pipeline," says Helms. "We look at that information every day."

Another key benefit is the company's newfound ability to publish global changes without accessing individual desktops. Helms comments, "It's fast and easy to make changes. Views can be changed centrally, then pushed out to users."

In the Support and Development departments, day-to-day processes move more fluidly than ever. Support leverages the Advanced Speed Search feature to decrease resolution times. Reps can quickly access past incidents to see if a colleague previously solved an issue, as well as search company manuals and other reference documents. Although Aspyra hasn't issued a formal poll, recent conversations with customers indicate an increase in satisfaction.

Looking ahead, Aspyra plans to increase its Sage CRM SalesLogix licenses, roll out the integrated solution to all locations, launch a customer Web portal, and potentially implement Sage CRM SalesLogix Marketing. In concert with its reseller and the Sage CRM SalesLogix support organization, which Helms describes as "timely and helpful," Aspyra is poised for continuing success and customer satisfaction.

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