



CUSTOMER SUCCESS STORY

CUSTOMER

CNL Investment Company

INDUSTRY

Real estate investment and financial services

LOCATION

Orlando, Florida

Number of Locations

Three

Number of Employees

785

SYSTEM

Sage CRM SalesLogix

CNL Investment Company: "Vision Creating Value" With Sage CRM SalesLogix

CNL Financial Group represents approximately 3,000 retail, restaurant, hospitality, retirement, corporate office, and industrial properties in 49 states, with combined assets of more than \$8 billion. CNL Investment Company (CNL) is the support arm to its sales division, raising capital to purchase real estate and pay investor dividends.

The sales group manages more than 70,000 records in its customer database, 700 items in its promotional item inventory, and complicated SEC, NASD, state, and broker/dealer regulations governing fulfillment. To manage the load, it recently re-engineered its internal processes and implemented Sage CRM SalesLogix to handle these requirements. The expertise and support of their reseller speeded development of the system and delivered value to end-users very quickly.

Superior Sales Management

"Sage CRM SalesLogix is the only application software used in our organization besides Office," says



Constantine Blinkov, director of business infrastructure at CNL. "It does everything for us, from storing customer account information to managing the materials that get printed in our mailroom."

CNL relies on Sage CRM SalesLogix to serve its diverse base of wholesalers. "The system allows wholesalers to track all account activities, set sales goals for individual contacts, establish marketing budgets, and even invite prospects to due diligence seminars," Blinkov notes. "Wholesalers can order personalized thank-you cards or letters, and the correspondence is automatically processed through Sage CRM SalesLogix. The system pulls up the contact's

CHALLENGE

Manual contact and sales tracking system offered only rudimentary customer relationship capabilities and made sales management cumbersome.

SOLUTION

Sage CRM SalesLogix was deployed to 30 mobile wholesalers on Compaq TC1000 Tablet PCs and to 80 home-office employees to manage the entire sales cycle.

RESULTS

Sage CRM SalesLogix provided the common infrastructure necessary to manage growth for a sales team that tripled, and a ten-fold increase in sales—bringing revenues to more than \$2 billion for the year.



Your business in mind.

