



CUSTOMER SUCCESS STORY

**CUSTOMER**

Heritage Log Homes

**INDUSTRY**

Real Estate

**LOCATION**

Sevierville, Tennessee

**Number of Employees**

75 employees; 80 independent dealers

**SYSTEM**

Sage CRM SalesLogix

## Sage CRM SalesLogix Helps Build Heritage Log Homes Sales By 24 Percent

Duane Schmitt, the MIS director for Heritage Log Homes, said, "We had 15,000 leads no one was following up on," largely because they couldn't adequately manage the tremendous volume of leads. Heritage was using a contact manager to track its prospects and customers, but business was growing and, as Craig Bull, general manager, noted, "It didn't offer the flexibility to do the things we wanted to do."



While Heritage required a more efficient lead management system, the company also needed to find a better way to preserve the 27 years of data it had accumulated and to eliminate redundant records stored in various databases.

"Not having a central database really hurt us. We could have multiple salespeople working on one lead, with no way of coordinating our efforts or knowing who really owned the lead," said Schmitt.

**Customization is Key**

The team at Heritage began a search for the right CRM solution, looking at several possibilities.

"We chose Sage CRM SalesLogix because it's extraordinarily versatile and we knew we could easily customize it to fit all of our needs," Schmitt said. "With a lot of other systems, you get their front-end and there's not much you can do about it. With Sage CRM SalesLogix, you can build almost anything you want to."

Heritage also chose certified Sage CRM SalesLogix Business Partner Josh Overt, president of Extremely Productive, to implement the solution. Overt and Schmitt began by asking Heritage's salespeople and dealers what they wanted from the system. Schmitt explained, "I sat down with salespeople and dealers early on because

**CHALLENGE**

Heritage Log Homes was losing a potential 15,000 clients because of their inability to follow up on leads. They needed a system capable of integrating data from each department's database.

**SOLUTION**

Sage CRM SalesLogix consolidated 27 years of data from multiple databases, allowing dealers to access customer information via the Web, as well as creating nine views of the database for an assortment of users.

**RESULTS**

Sales increase of 24 percent due to the streamlined efficiency afforded by the SalesLogix system integration and its exceptional lead management system.



Your business in mind.

*"Sage CRM SalesLogix has brought a lot of prospects to the top and given us a bull's eye of who we need to focus on to make us successful."*

—Craig Bull  
Heritage Log Homes  
General Manager

## 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.



they're the ones who are going to be using the system."

### **Sage CRM SalesLogix Rollout is a Success**

Heritage's first goal was to consolidate the data from each individual database into one. "Before, all the pieces of the puzzle were kept in multiple databases, and no one was communicating," Ovetz recalled. Now all that information is stored in—and accessible through—Sage CRM SalesLogix.

"Twenty-four hours a day, seven days a week, any member of my team can access the critical customer information they need," said Schmitt.

The company's next goal was to add dealers to the system. Once accomplished, this provided dealers with the tools they needed to manage their pipelines and receive new sales leads. The leads that pour in through the Web site, telephone, open houses, and other events are now imported into the Sage CRM SalesLogix database and automatically routed to the correct dealers or sales team.

### **Sales Up 24 Percent**

To say that Heritage's salespeople have begun using Sage CRM SalesLogix with real enthusiasm would be an understatement.

"Before, we had a scattered situation and it was hard to stay on top of our prospects," said sales rep Darryl Wilson. "Sage CRM SalesLogix has enabled me to keep up with my prospects as well as helped me better meet my customers needs."

Satisfied customers are more apt to tell others about our great service and these leads are our best source for new customers."

In fact, since the Sage CRM SalesLogix implementation, Wilson has gone from being one of the company's "less successful" sellers to one of their top. And, overall, sales by Heritage's entire sales team have increased by 24 percent. "I'm not sure I can attribute all of that to Sage CRM SalesLogix," general manager Bull said, "but I'm sure it plays a big part."

"I've heard the comment from customers, saying why they bought from Heritage, 'You called me back.' With the number of leads we receive, it's next to impossible to do that manually. Sage CRM SalesLogix has brought a lot of prospects to the top and given us a bull's eye of who we need to focus on to make us successful."