



CUSTOMER SUCCESS STORY

**CUSTOMER**

Lifeline Systems, Inc.

**INDUSTRY**

Emergency response services

**LOCATION**

Framingham, Massachusetts

**Number of Employees**

800+

**SYSTEM**

Sage CRM SalesLogix

## Lifeline Systems Saves Seniors' Lives and Helps Caregivers

Millions of seniors and people with disabilities are able to feel confident at home because of a simple device worn on their wrists or necks. In the event of emergency, a subscriber simply pushes the Lifeline Personal Help Button and is connected to Lifeline's call center.

A trained counselor identifies the problem, arranges for assistance, and follows up until the subscriber's situation is resolved.

Lifeline's services are distributed through more than 2,500 hospitals, social service agencies, and organizations that serve seniors and people with disabilities. The company signs up subscribers through hospital-managed Lifeline programs and through relationships with individual healthcare providers. For years, account reps struggled to manage huge territories using Microsoft Outlook as their only sales and contact management tool.

**Data Just a Click Away**

"All of our referral source data was stored in individual reps' computers," explains Jonathan Sweig, manager of sales force



automation. "Headquarter staff members were unable to assist field reps with fulfillment, territory management, or specific marketing programs. So, a year ago we implemented Sage CRM SalesLogix in our Senior Living Division, the group that markets to assisted living facilities and retirement communities. Our local Sage Software business partner helped us through a needs assessment process to determine how Sage CRM SalesLogix would address our requirements. They also helped with implementation, customization, training, and support. The results were so impressive that we expanded our CRM initiative to

**CHALLENGE**

Lack of centralized customer database hampered direct marketing efforts, limited strategic planning, and prevented streamlined fulfillment of collateral materials on behalf of field representatives.

**SOLUTION**

Sage CRM SalesLogix manages customer, referral source, and prospect relationships in Senior Living and Healthcare Divisions; Program Services Division may implement based on successes in other divisions.

**RESULTS**

Market development coordinators are at least 25 percent more effective, and subscriber base growth of several points in first year attributable to Sage CRM SalesLogix outbound mailing capabilities.



Your business in mind.

*"One of our salespeople had a five percent subscriber growth in her territory this year, primarily because of the mail merges we can now do with Sage CRM SalesLogix. ... Sage CRM SalesLogix will help us maintain our leadership position through better knowledge of our referral base and enhanced communication with all of our delivery channels."*

—Jonathan Sweig  
Manager of Sales Force Automation  
Lifeline Systems, 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.



include our Healthcare Division and Inside Sales, and also plan to use it in our Program Services department.

Account representatives, whether in-house or in the field, enter contact information, notes from meetings, leads for new referrals, and requests for collateral materials. The database contains information on more than 40,000 referral sources. The company uses synchronization to capture data from remote users and manage fulfillment. As a result, it now has a centralized repository of information on which healthcare providers are interested in Lifeline and an up-to-date interaction history describing their relationship with the Lifeline representative.

### Sales Reps Are Sold

"It took a while for some of the reps to see the value in using Sage CRM SalesLogix," Sweig says. "Many didn't want to spend time entering data. But, once they realized how the system made their lives easier, through reports developed specifically for them, they became believers. They're giving us fantastic feedback about how simple it is now to find customer data in a hurry, plan for sales calls, and make sure that all customer requests are satisfied. One of our salespeople had 5 percent subscriber growth in her territory this year, primarily because of the mail merges we can now do with Sage CRM SalesLogix. Company-wide, I'd estimate that several percentage points of our sales growth can be attributed to the capabilities of Sage CRM SalesLogix."

Lifeline's goal is for reps to meet with each referral source once a month. So managers appreciate being able to pull up Sage CRM SalesLogix reports listing referral sources that have received calls or meetings in the last 30 days, as well as sources who have not. "The reports help reps use their time more efficiently," Sweig notes. "Now it's almost impossible for a contact to fall through the cracks."

Sweig is convinced that Sage CRM SalesLogix will play a big role in the company's continued success. "Lifeline was the founder of personal emergency response services, and is currently North America's leading provider," he says. "Sage CRM SalesLogix will help us maintain our leadership position through better knowledge of our referral base and enhanced communication with all of our delivery channels."

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