



CUSTOMER SUCCESS STORY

**CUSTOMER**

National Research Council of Canada's Industrial Research Assistance Program (IRAP)

**INDUSTRY**

Publicly funded scientific and technology organization, helping small and mid-sized businesses adopt technology.

**LOCATION**

Ottawa, Ontario, Canada

**Number of Employees**

400

**SYSTEM**

Sage CRM SalesLogix

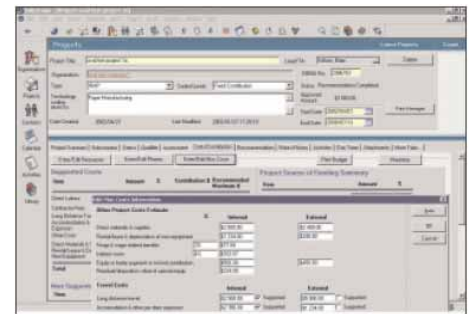
## Sage CRM SalesLogix Creates a Knowledge-Rich Environment for Canada's IRAP

Winter can be cold in the Canadian Maritimes, those provinces bordering on the Atlantic Ocean. So cold that ice often covers the bays where fish farmers build their pens, making it difficult to harvest their product.

One entrepreneur had a better idea—house the pens on land and harvest his flounders in comparative luxury. However, the innovator needed information on the technologies required to raise fish indoors on an economically viable basis.

Enter IRAP, the Industrial Research Assistance Program, which is part of the Canadian National Research Council (NRC). IRAP employs about 400 people across Canada to help small and mid-sized businesses turn research and technology into business opportunities. Some 260 Industrial Technology Advisors (ITAs) work directly with clients in the field.

IRAP decided to implement Sage CRM SalesLogix to replace a mix of fax, phone calls, courier, and e-mail between ITAs and IRAP headquarters in Ottawa.



**Functionality and Flexibility**

"We decided that a customer relationship management (CRM) system would most closely meet our needs," said Brian Wilson, manager of IT at the time.

"We looked at a number of CRM tools and narrowed the field to Sage CRM SalesLogix and two others," he said. "Sage CRM SalesLogix not only had the functionality, but also could be tailored to fit our specific requirements. Sage CRM SalesLogix also had the ability to scale to meet our future needs."

Wilson added, "Another big plus is the ability to synchronize databases. ITAs and

**CHALLENGE**

To streamline communications, operations, and processes related to helping small and medium-sized businesses make full use of NRC-IRAP research and development services.

**SOLUTION**

Implementation of a highly-tailored version of Sage CRM SalesLogix to facilitate communication and gather important operational and financial data.

**RESULTS**

Innovation promoted through streamlined processes, improved client communications, and a knowledge-rich environment for decision making.



Your business in mind.

*"Sage CRM SalesLogix has helped me make a tremendous difference in the way IRAP delivers service and I believe it has the functionality to do it even better."*

—Brian Wilson  
Canadian National  
Research Council  
IT Manager

other field personnel download subsets of the central CRM database so they can work independently from the network. This was a big factor in choosing Sage CRM SalesLogix."

"Sage CRM SalesLogix provided the core modules," Wilson continued. "We added more modules, redesigned the screens to meet our needs, and built additional tools for our field and back-office workers."

"We're still modifying and adding to the system," he said. "For example, we took a number of screens used to enter project information and consolidated them into a single screen. Now, ITAs in the field enter program and financial information, and our headquarters people use the same screen to enter more data. Then, Sage CRM SalesLogix generates a new screen—an agreement among NRC, IRAP, and the client. It enables us to quickly and efficiently generate working documents in the field from data stored centrally."

### **Sage CRM SalesLogix Has Made "A Tremendous Difference"**

Wilson said, "Our clients now receive more information to help them build their businesses and create supportive relationships with a variety of technology resources."

"For us, Sage CRM SalesLogix means timely access to accurate information, better collaboration and information sharing among peers, faster turnaround on client projects, and the ability to track our financial assistance projects on-line more easily," he continued. "We have also created a knowledge-rich, database-driven environment to help IRAP people make quality decisions."

"We will continue to adapt and scale Sage CRM SalesLogix to meet our present and future needs," Wilson concluded. "Sage CRM SalesLogix has helped me make a tremendous difference in the way IRAP delivers service and I believe it has the functionality to do it even better."

## **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.



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