

CUSTOMER SUCCESS



Sage SalesLogix—a well-engineered CRM solution for PMK Group

PMK Group, a consulting and environmental engineering firm, offers an extensive array of services to both public and private clients throughout the Northeast. Recognized as one of the fastest growing engineering firms in the United States, PMK Group provides environmental, engineering, environmental hygiene, and regulatory compliance services.

Becoming Client Focused

Although PMK Group has always successfully managed its projects, it came to realize that its project-based business model placed a larger focus on the project rather than on the client.

With no central database for client, opportunity, and prospect information, each department kept separate data files—unaware of what the other departments were doing. Strong client relationships, the key to a professional services firm's success, were suffering.

“We wanted to move from a project-based model to a client-centric model—where our clients are the focus of our business, rather than the projects,” explains Philip Angarone, marketing director at PMK Group. “To do that, we needed a client relationship management solution. Sage SalesLogix is the tool we chose.”

PMK Group analyzed several client relationship management (CRM) solutions, and selected Sage SalesLogix for its customization capabilities, its centralized contact and opportunity database, and its strong marketing capabilities.

Zeroing In On Opportunities

Prior to implementing Sage SalesLogix, it was not uncommon for opportunities to slip through the cracks. Each office—in some cases each department—used a separate system for tracking opportunities. A disjointed collection of word processing documents, spreadsheets, and databases held client, prospect, and opportunity data—but provided no overall visibility into the company's pipeline.

“During a conversation, a client might refer to another project our firm was working on for them—a project our employee wasn't even aware of because we had no centralized source for this information,” recalls Angarone.

Customer:

PMK Group

Industry:

Engineering and Consulting

Location:

Cranford, New Jersey

Number of Locations: 3

Number of Employees: 200

System:

Sage SalesLogix

CHALLENGE

The lack of a centralized customer database led to missed opportunities, inconsistent customer communication, and difficulty building cohesive relationships with customers and business partners.

SOLUTION

Sage SalesLogix serves as the single location where staff can store customer information, communicate proactively with contacts, and track the firm's prospects and opportunities.

RESULTS

Access to information helps staff build stronger customer relationships; management has full visibility into the opportunity pipeline; and marketing communications are highly targeted—and effective.

Now, all opportunities are recorded in Sage SalesLogix, and given a tracking number that follows a project through its life cycle. At any time, management and staff can see the status of opportunities in the pipeline. Before a meeting with a client, staff can review a client or prospect's history in Sage SalesLogix to ensure they are working with the most up-to-date information available.

Assembling Winning Teams

PMK Group often teams with architectural firms and other engineering firms to bid and execute projects. Sage SalesLogix provides the firm with the ability to associate these other firms and the individuals involved with a specific client proposal.

PMK Group now uses this information to strategic advantage; analyzing its win and loss record by team. "We can see trends, such as great success when we work with this firm, or less success when we work with another," explains Angarone.

Perfecting Its Marketing

As part of its client-focus, PMK Group now communicates frequently with its clients and prospects, and Sage SalesLogix facilitates such communication.

One means of communication PMK Group uses is a survey. The survey is generated within Sage SalesLogix and sent by e-mail to clients. The survey results help PMK Group understand the preferences of its clients, and serve them more effectively. "We're able to respond to our clients needs, because we're able to collect and track their preferences in Sage SalesLogix," says Angarone. For example, the firm used to send out a weekly energy-market update by e-mail. A survey revealed that most clients preferred a bi-weekly mailing—so PMK Group made the change.

The firm recently hosted a presentation on green building practices at an area conference for county governments. Using Sage SalesLogix, PMK Group was able to target prospects and clients who met specific criteria, and send them an e-mail invitation to the event. "Our event was the most attended event at the conference," recalls Angarone. "Representatives from over 70 percent of New Jersey's counties were in attendance."

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Sage SalesLogix gives PMK Group the client-centric focus it needed. With the ability to accurately monitor open proposals, track active opportunities, and communicate effectively with its clients—all from one centralized database, PMK Group has seen its success grow. Angarone sums it up, "Sage SalesLogix has helped us achieve our goal of a client-centric organization. All of our activities are focused around, and driven by, our client relationships."

ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

