

Oiling the wheels of business development

“New tools have to fit with the way you work, otherwise you stop using them.”

– Andrew Corner, sales and business development director, CS-VUE Online Consent Compliance

Hosted CRM is one of the big success stories of B2B technology provision. But it hasn't been all plain sailing for users. A common complaint is the tendency for CRM providers to dictate the terms of conducting business. But most vendors will tell you that designed intractability is a small price to pay for the benefit of a 'plug-in-and-play' solution. So much for customer centricity. Thankfully, in every category there's usually a competitor who understands user needs better than others. At least that's what Andrew Corner found when he chose i-track.net to streamline his business development.

Trying to keep track

It was Andrew Corner's task to commercialise hosted consent compliance tool CS-VUE. A niche online system used by local government and corporate sector organisations to track complex resource management consents, Corner required a CRM system that provided secure distributed access to fellow shareholders and directors, and lowered administration time.

Using Microsoft Outlook and Excel to keep track of things was driving him around the bend. *"Outlook and Excel was just too hard and didn't provide any transparency for fellow directors to see what was going on and contribute,"* says Corner. *"Using spreadsheets is a nightmare, and paper was hopeless."*

Corner didn't need to be sold on the benefits of using a hosted solution – a central feature of CS-VUE – nor the value of a CRM solution, which he knew was the only way to remove administrative burden from tracking and monitoring sales activity. What he wanted most was a CRM solution that obeyed his current workflow, rather than prescribing a raft of new behaviours.

On the right track

Wary of being railroaded into certain ways of doing business, CS-VUE wanted a CRM system that could be configured to its unique business model. With this in mind CS-VUE chose i-track.net. *"New tools have to fit with the way you work, otherwise you stop using them,"* says Corner.

Developed and supported in New Zealand, i-track.net lets users track and manage activities, tasks, projects and contacts within a single environment, establishing a knowledge base for the entire organisation.

"Anyone new to the business can hit the ground running. The full history is there and there's no need to deal with the nightmare of spreadsheets. So handover and knowledge transfer is far better," says Corner. *"It's about best practice sales management."*

Big Wins

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- The hours once spent sifting and tallying workflow information have been replaced by instant reporting.

"It has simplified everything and significantly lowered administration time.

Reporting that once took hours is now managed with a mouse click," says Corner.

Ease and flexibility

- i-track.net listened closely to CS-VUE's feedback, adding new functionality specific to their requirements. Allied to this configurability is an ongoing product development programme based on the analysis of hundreds of businesses.

"They are a good team and jumped on our feedback, introducing several useful enhancements," says Corner.

Small-medium business knowledge

- CRM professionals with strong business management backgrounds have developed i-track.net specifically for small-medium businesses. The mix of technology and business is reflected in systems design and intuitive workflow.

"i-track.net fits with the way we work. We looked at other systems and they were expensive and took a lot to configure," says Corner.

Best practice sales management

- A consolidated corporate database provides CS-VUE with total visibility and the facility to introduce new employees, without handicapping them with obstructive knowledge management practices.

"A centralised database ensures that they hit the ground running. They don't want a spreadsheet. Handover and knowledge transfer is far better," says Corner.

