Friction & Drama Avoided.

How MondoCRM was able to help its client upgrade from a dysfunctional CRM to one that functions quickly, seamlessly and effortlessly.

COFFMAN Truck Sales

A CASE STUDY

A deep cross-platform expertise enabled MondoCRM to help a commercial truck dealership change CRM systems without their sales team missing a beat…and complete the transition in a single day.

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We facilitate insight.

Executive Summary

MondoCRM knows the worst CRM is always the one not being used. We also understand the troubling dynamics of "the devil you know."

In just 1 day, we migrated Coffman Trucks from *Act!*, converted the data and was able to bring vital new functionalities to bear and even save them money:

- ✓ No new hardware investment
- ✓ Identical layouts so need for additional training
- ✓ ROI achieved within hours

The Challenge

Their *Act!* platform was clunky, internal server requirements were burdensome and they were profoundly dissatisfied with *Act!* support, beginning with a friction-riddled onboarding experience. Sales reps no longer had faith in its CRM due to system instability and a poor user experience, leaving management without access to vital and timely information needed to run the business. Company executives accepted the necessity for making a change, but how could they accomplish it without throwing their business operations into turmoil?

The Solution

Like crossing the River Styx, management was now faced with the daunting proposition of trading the only CRM platform they ever had for the unknown.

MondoCRM suggested *WiredContact Enterprise*. Since *WiredContact* was developed by former *Act!* engineers and consultants, the user interfaces and basic processes are strikingly similar. Any concerns about resistance from the sales reps were avoided.

WiredContact has a built-in utility to convert *Act!* SQL files so there was no need for 3rd party software to complete often daunting task of migrating data.

The Impact

Everyone noticed the improvement in overall system stability and simplicity right away. Management appreciates the extra layers of security that ensure reps can't delete data or export customer lists to *Excel* without permission.

Since installation day, the system has been up and functioning 100% of the time. Better still, Management appreciates instant insight from one-click reports and they can track each rep's activity for any given time period. *Coffman* can now share data between departments without the security limitations of *Act!*

Mondo was able to seamlessly transition the company from *Act!* to *WiredContact* in a single day...and total project cost came in at a price that made *Coffman* management happy.

The Client Quote

After a brief discovery call and presentation, the sales manager simply said, "Here is my credit card. Let's get it done!"

The Key Takeaways

1. With MondoCRM on point, change doesn't have be expensive, disruptive or scary.
2. Data conversions can be fast and painless.
3. A stable system keeps maintenance costs low and sales reps selling.
4. When reps are actually using their CRM, deals don't slip through the cracks and management can monitor process and pipeline efficiently.

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