



All Her Stuff In One Place.

How MondoCRM was able to help a solopreneur client keep all her gigs straight and data simple for better productivity.



A CASE STUDY

A deep cross-platform expertise enabled MondoCRM to help a nonprofit executive, political consultant and legislative aide consolidate her information and align it with what she needs to accomplish in her various roles.



Executive Summary

MondoCRM knows keeping 20 years of relationships at one's fingertips isn't easy. But for many, it's how they earn their living. And make the world a better place.

In just 1 day, we migrated Pat Ewert from *Act!* to *Zoho*, converted the data and was able to bring vital new functionalities to bear and even save her money:

- ✓ Consolidated 3 Act! databases and 20 years of contact notes to a single Zoho application
- ✓ Instant, seamless mobile access & performance
- ✓ 2 hours total training time to full functionality



The Challenge

Pat worked with 3 Act! databases between two offices, and keeping it all straight was becoming a job in itself. Act! required too much home infrastructure (and cost) to maintain her data and synch her databases. Retaining an IT contractor was out of the question. And on the road? Forget about it! She had zero mobile access. Wherever she was, it seemed like her information was somewhere else. It also occurred to Pat that Act! was becoming more expensive for less reliable performance and functionality.

The Solution

Like crossing the River Styx, management was now faced with the daunting proposition of trading the only CRM platform she had ever used for a platform with which she was previously unfamiliar.

MondoCRM suggested Zoho CRM, part of a completely integrated and mobile platform of more than 40 apps.

Better still, Zoho's free version currently gives her all the power and functionality she needs, and then some.

MondoCRM made sure the massive data migration went off without a hitch and that everything ended up where it is supposed to be.

The Impact

Pat is thrilled to have all her data consolidated. She is over the moon that she now has access to it wherever she is. She no longer finds herself lost in a meeting trying to recall a 5 year-old conversation vital to the subject at hand.

So how was the transition? Thanks to MondoCRM's expertise and intuitive instruction, Pat was up and functioning in about an hour.



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The Client Quote

"I am so happy! Can MondoCRM be my data spouse?"

The Key Takeaways

1. With MondoCRM on point, change doesn't have to be expensive, disruptive or scary.
2. Data conversions can be fast and painless.
3. Our clients can both increase functionality and save money at the same time.
4. Powerhouse CRM performance no longer requires massive IT & networking infrastructure.



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