



Effective Solutions SUCCESS STORY



LUCAS-MILHAUPT CALLS ON EFFECTIVE SOLUTIONS TO IMPROVE SALES EFFECIENCY.

Lucas-Milhaupt in Cudahy, WI specializes in providing precious metal brazing products that allow their customers to connect two different types of metals. Effective Solutions created for them, an ACT!-based Sales Support System to provide greater control and visibility of the overall sales process, including the ability to monitor and forecast sales.

For over 65 years, Lucas-Milhaupt has helped companies solve the problem of connecting dissimilar metals. Until recently, Lucas-Milhaupt had a challenge of their own. They recognized that they needed greater control over their nationwide sales efforts. Sales Manager Bruce Church contacted Effective Solutions for help.

“We were in severe need of more information. Our sales force had a limited amount of information to sell with, and management had even less. Sales performance was based solely on the numbers,” said Church. “We wanted a solution that allowed us to monitor our sales process as a whole. Ultimately, by bringing this information together, we have a tool to grow and improve our sales force.”

ACT! PROVIDES POWERFUL FEATURES THE CLIENT CAN USE

Effective Solution’s unique consulting process begins with a thorough Needs Analysis. For Lucas-Milhaupt, we identified several key processes that were critical to address in a customized solution in order to achieve Lucas-Milhaupt’s specific goals.

First, Lucas-Milhaupt’s sales force needed to manage and organize their sales activities, as well as record major sales opportunities. Effective Solutions worked with Lucas to determine data entry expectations, and customized end-user training to match those expectations.

Second, Lucas-Milhaupt needed the ability to consolidate and share communications that occur between the various department groups and customers on a daily basis. Outside and inside sales, telemarketing, and technical support functions were all incorporated into the new system. By using specific fields and keyword identifiers, Lucas-Milhaupt is now able to run Activity Reports which track the origin of sales leads, samples sent to customers for evaluation, and support issues. Details are accessible from individual customer records, making it easy for management to generate regular reports to understand sales and customer service performance.

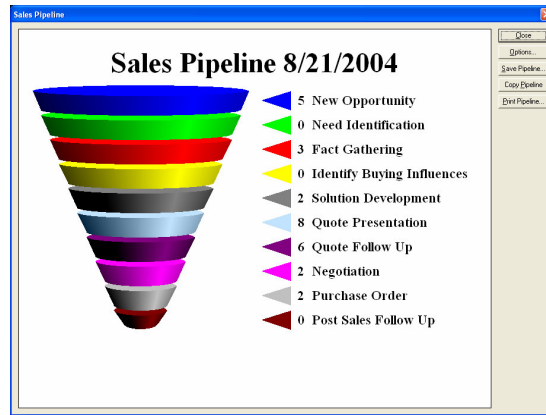
KEY ACHIEVEMENTS

- Sales are up over 30% from last year, with the same staff.
- Streamlined Lead Generation Process. Leads generated from TeleSales are passed electronically to the appropriate salesperson and monitored through the sales process.
- The customized Sales Pipeline tool allows Lucas-Milhaupt to see all of the sales opportunities that exist and what stage they are at.
- Sales activities can now be monitored, and are used as a training and guidance tool to make salespeople more efficient.

CUSTOMER SUMMARY

- A Leader in the brazing industry.
- Nationwide Sales Force, Inside Sales/Customer Service and Technical Support Groups
- First established in 1968
- 15 users of ACT over the network and 20 remote users that synchronize their data on a regular basis.

Lucas-Milhaupt relies on ACT! to distribute leads and monitor those leads as they are guided through the sales process. The Sales Opportunity feature was customized to match their Sale Process.



Accessibility was critical to Luca-Milhaupt's nationwide sales force and other positions that demanded remote access. Effective Solutions configured email and network synchronization so that users with laptops could update their data and then automatically synchronize once a day to send and receive changes with the database at headquarters.

LUCAS-MILHAUPT SEES AN INCREASE IN SALES NUMBERS AND EFFICIENCY

Sales are up 30% from last year, with the same staff. Lucas-Milhaupt believes that the improved efficiency of the customized ACT! System is the main contributor to this exciting increase. Reports from ACT! are being used to identify sales trends, potential issues, and sample activity. Sharing information between inside sales, outside sales, telesales, tech support, and

customer service have become a significant competitive edge for Lucas-Milhaupt.

Bruce Church, Sales Manager, also realizes that he has a tool to grow and improve his sales force. Data from the sales reports highlight strengths and weaknesses of his individual sales people, allowing him to manage and train them more effectively.

Knowing what his salespeople are working on gives Bruce the ability to prioritize sales opportunities so that resources are directed to the most promising opportunities.

Bruce can also give a heads up to production and purchasing to let them know what big projects are coming up in the pipeline. In a manufacturing situation, this can have a dramatic impact on the

ability to deliver to the customer on time.

“EFFECTIVE SOLUTIONS REALLY UNDERSTOOD WHAT WE NEEDED AND DELIVERED A TARGETED SOLUTION”

“Effective Solutions analyzed our business and sales system, and developed a customized solution to meet our specific requirements. Everything they provided, from the database and reports to end-user training, was designed to match our selling system”, says Bruce Church. “We use Effective Solutions on a quarterly basis to continuously improve our system, and to provide our team with regular training to better support their effective use of the system.”

ACT! CERTIFIED CONSULTANT



Solutions that Grow Your Business

www.effsolutions.com

Effective Solutions is a group of Business Consultants specializing in ACT! Software.

Through our unique consulting process we are able to create a selling system for our customers that significantly increase lead generation and sales. Our combination of business practices, sales and technical expertise is unmatched in the industry.

Systems include flowcharted diagrams of the sales process, an ACT! User Handbook specific to the customers system, customized training sessions and an annual support and training plan.

Contact Effective Solutions at:

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Call us today to see if you qualify for a FREE 1-Hour Consultation