

CUSTOMER RELATIONSHIP MANAGEMENT IS BUILT INTO THE WORK FABRIC AT ET PRODUCTS, INC., A SATISFACTION-FOCUSED DISTRIBUTOR.

Like that old country & western song “I Was Country Before Country Was Cool,” the team at **ET Products Co.** led by Vice President **Tracy Miller** might lay claim to a similar catchphrase, that they were CRM before CRM was... well, one of the hottest topics in business today.

CRM is all about deepening client relationships. It’s an attitude. A philosophy. The software is just a tool. What really counts is a company’s focus on meeting client needs and building lasting relationships. The staff at ET Products has known this a very long time.

Bremen, Indiana based ET Products is a manufacturer and distributor of diesel fuel additives and industrial lubricants. They serve a client base spread across 20 states, through a field sales force of about ten reps. Typical clients are fuel jobbers, truck stops and terminals. Customers interact with both field reps and the home office.

Ten years ago ET Products implemented a product called TeleMagic® to track customer interactions. Last year, with TeleMagic being phased out of the marketplace after a long run, and supplanted by newer, more robust solutions, the team at ET decided to take the plunge and upgrade to the current version of Best Software’s *SalesLogix*®, one of the world’s most highly praised CRM software solutions.

With *SalesLogix*, everyone in the company now has access to the same information. The home team knows what the field team has said and promised -- to whom, and when. Collectively, they can manage prospects, pricing, orders, quotes, conversations and a host of other information that keeps them close to their customers.

Staff at ET enter records of all client conversations via notes, which are categorized for lightning fast reference and lookup. For example, one category of notes is price quotes; another is orders; a third is sales terms. Any authorized user

can quickly look up, say, just the history of quotes... or just view pricing... depending on what’s of interest to them.

Armed with this extensive database of information and contacts, reps can look over prior history and determine who needs what products when. Since much of ET’s product base is winterization products, reps have a heads-up on future ordering patterns. And when a client says “Give me the same order as last time,” it’s a quick lookup and a fast order.

The system also helps with automated recalls for follow-up, which can be performed by anyone on staff. Tracy notes that the information is always accurate, dependable and up to date.

One key advantage of the new system, notes Miller, is that “if a salesperson should leave, or transfer to another territory, the entire history of the account base is safely stored in *SalesLogix*.”

Remote reps perform regular synchronizations with the home office once or twice weekly, so everyone is seeing the same, up to date client data. The synch takes only 5 minutes and runs automatically and reliably.

Tracy also complimented the PMI implementation team who made it happen, including **Kelly Sappington** and **Joseph Gress**. “I always enjoy working with your team. You understand us, and don’t waste our time or money. You often find workarounds for us. And you’re always punctual. That stuff matters to us.”

It matters to us, too, Tracy.

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Tracy Miller, Vice President, ET Products

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