

DEVELOPMENT OF CRM AND SALES RENEWAL TRACKING SYSTEM.



GENERAL INFORMATION

Company:
LATINSOURCE TECH

Industry:
Technology - Software

Project:
Development of CRM and sales
renewal tracking System.

Interviewed:
Marianela Fernandez,
Marketing Manager

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Technology:
- PHP
- PostgreSQL
- Red Hat Linux

NEED

LatinSource Technology needed to count with a tool for the administration of its relationships with clients, prospect, distributors and a personal an commercial data repository.

The objective of the project was to consolidate all the prospects and clients in all the region by means of a tool that permitted to import present and future databases and carry out segmentations of all kinds to then export them to easy to handle formats with desktop tools.

The client also had the need to carry out a tracking of the sales renewals, generate sales reports, analyze the subscriptions, between other.

BUSINESS CHALLENGE

The biggest challenge Exelsum had to face was to assure that all the applications were compatible with Red Hat operative system and with the Open Source office suite used in LatinSource Technology.

The needs of the client were properly interpreted; there was great learning of the business it carries out to be able to achieve the planned objectives.

Given that LatinSource has offices in different countries all the tools had to run in Web Environment.

PROJECT DETAILS

LatinSource has more than 100 business partners and clients of all sorts, sizes and in all the countries of the region.

The sales team and the marketing department needs to unify their data in one, sole database. After more than 3 weeks of analysis a project was elaborated for the implementation of the required systems.

CRM: this tool permits to administrate contacts, companies, import database of any format, carry out exportations of all kinds, use advanced filters, generate statistics, create issues to assign to different segments, integrate itself with the corporative portal and other systems of the company.

Renewal Tracker: this tool is of great utility for the company. A great number of reports were created to be able to administrate efficiently the subscriptions, renewals, and give

CORPORATE INFORMATION

LatinSource Technology is a regional company devoted only to distribute exclusively Red Hat Inc.'s products and services.

It has offices in Argentina, Chile, Peru, Colombia and representatives in all the countries within the South American region.

a detailed tracking of the business opportunities with this origin. This module permitted a wide increase in the number of renewals.

TECHNOLOGY

Programming language: PHP

Database: PostgreSQL

Platform: Red Hat Linux

In Web Environment

WHY EXELSUM?

"We knew that Exelsum is a specialist in development with Open Source tools and they had already provided to us their e-Portal tool for the building of www.latinsourcetech.com, what made them more trustworthy and predictable than other suppliers we evaluated. Given that the CRM we needed was a tailor made one and we didn't count on the time to explain everything from scratch, knowing that they knew extensively our business was important as well.

We evaluated the implementation of SugarCRM, an Open Source tool, but the implementation time and the chances we had to carry out for it to adapt to our necessities involved between 6 and 7 months work."

. You can also read this Success Story directly from our website:

http://www.exelsum.com/success_stories/