



Results Offers Visibility to Future Performance

Company uses Results CRM to manage and track quotes and potential sales, providing visibility into the company's future performance.

"Results CRM gives our sales force a tool for lead and contact management. Managing our sales in Results provides motivation and visibility to the future performance of the company."

John Rosende
President
The Molding Depot

Customer Profile

The Molding Depot, Inc. is a family owned and managed business with over 35 years of experience in the millwork industry. The company is committed to meeting their customers' millwork requirements with the best available materials at competitive prices. They specialize in high quality architectural millwork, including windows, doors, and moldings. They represent some of the finest manufacturers and vendors in North America.

The Molding Depot works closely with vendors to give their customers the most competitive pricing possible. With their extensive industry knowledge and complete product line, the company takes pride in helping customers accomplish their goals.

Solution Overview

Results CRM is the ideal solution for businesses that want to enhance their customer relationships, continuously measure their performance, make educated decisions, and reduce operational costs.

Whether you need a way to manage individual departments or your entire organization, Results delivers a 360-degree view of your operation. Results provides a complete and flexible approach to business information management and business process automation for sales & marketing, service delivery, project management, timesheets, time-billing, invoicing, order tracking, and payment history.

Results synchronizes customer, vendor, employee, sales order, invoice, payment, and inventory data with QuickBooks. It provides full visibility into the financial status of each customer — regardless of whether you enter the data in Results or QuickBooks.

SUCCESS STORY

The Molding Depot

AT A GLANCE:

Customer:

The Molding Depot

Location:

Florida

Industry:

Millwork Construction

Business Challenge:

Needed to manage sales opportunities and quotes in a system that would integrate with QuickBooks.

Solution:

Results CRM Business Suite has provided visibility to the company's quotes and sales opportunities.

Results:

The Molding Depot uses Results to make appropriate business decisions about the future of the company.



Business Challenge

The Molding Depot wanted to keep QuickBooks as their Accounting software but needed a way to further streamline their sales efforts. In addition, the company needed a way to electronically file the technical documents associated with each quote.

Managing Quotes & Sales Opportunities. Each day, The Molding Depot receives customer inquiries and issues several job quotes. They needed a way to track all leads, quote activity, sales opportunities and potential revenues.

Documentation for Jobs. Most of the issued quotes have associated technical specifications and CAD drawings. The Molding Depot needed to keep the documentation and email communications together while providing each team member access to all the relevant data and files.

Clean QuickBooks Data. Since the company was using QuickBooks as a provisional CRM and estimating software, their QuickBooks data had extra leads and prospects records. They wanted to limit the data entered into their accounting software to customer and their financial data.

Business Benefits

Results CRM has provided The Molding Depot with the tools necessary to manage their sales pipeline and access all associated technical drawings. With the QuickBooks Integration Module, The Molding Depot has been able to easily integrate existing QuickBooks information into Results.

Quote, Sale and Lead Visibility. With Results CRM, the Management and Sales Teams have visibility to all quotes and potential leads. The automated Business Processes feature in Results allows the company to easily and consistently follow up on leads.

Document Management. Results became the central repository for all technical documentation; quote, email and project activity. All team members can access the project details without having to retrieve any physical paper files.

QuickBooks Integration. With Results CRM, only sales and customers are transferred into QuickBooks. This process keeps the QuickBooks application focused on financial transactions and provides the sales force a specialized sales tool..

"The automated business processes feature in Results assures my sales team follow a proven formula to handle the sales process. Using Results saves time and provides a consistent way for us to organize, manage and view our contacts and all relevant data."

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President
The Molding Depot

FOR MORE INFORMATION VISIT:

Results Software
www.Results-software.com

Quick Books
www.quickbooks.com

Our product and QuickBooks Financial Software work together to help simplify your business management. QuickBooks 2006 Financial Software helps you get more done faster, with a new Home page, simplified Customer and Vendor Centers, and sophisticated business planning tools.

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