TopLine RESULTS

TOPLINE DESIGNER

TopLine tools spark integration for Catalyst

Catalyst Equity Group deals with one of the business world's toughest challenges: acquiring previously independent companies and integrating them successfully into a larger corporate structure. Success requires Catalyst, a private equity firm specializing in capital equipment manufacturers, to maintain a balance between corporate control and subsidiary comfort level.

The fifty-person Catalyst corporate staff has some built-in advantages when taking on a new acquisition. Integration is made easier by the firm's focus on companies in the food processing and metal fabrication industries, two fields the staff already knows well. Catalyst also draws upon the specialized knowledge of TopLine Results Corporation consultants to customize their Act! system. By deploying TopLine Designer, add-on solution for Act! custom tables, Catalyst is able to seamlessly integrate a new subsidiary's sales and customer service data.

Diane Ravenstien, the firm's marketing manager, sees the use of Act! as an important advantage for firms that grow by acquisition. She noted that many of the firms Catalyst acquires already use Act! at some level. "A lot of times we find that it's already in place," Ravenstien said. "So many sales people are already familiar with Act!, that expanding its capabilities doesn't represent much of a culture change. That's good news for them, and it's good news for us."

"We use (Act!) as a single container for so many of our activities," added Catalyst data analyst Jean Ehler. She manages the Act! databases accessed by 115 users, including 40 field sales people who synchronize data daily through a remote internet connection. "We use (Act!) as a reporting and forecasting tool. It does our email blasts. It's a marketing and sales tool. It's part of our corporate culture, which allows it to translate very easily to the new people who join us."

Tangible results

Absorbing an acquired company's sales and customer data into Catalyst's existing Act! system is a key challenge. However, this process is significantly streamlined through the use of TopLine Designer which makes it easy to link new tables of information to data in Catalyst's five existing corporate sales and customer service databases. The resulting enriched data is used to meet enterprise-wide needs, including:

- Tracking the efforts of salespeople, both office-based users who access their data through Microsoft Terminal Services as well as the laptop-based users who transmit their data through the powerful Act! synchronization engine

- Managing existing relationships by integrating sales contact data with information on customer service contacts, inquiries on replacement parts and requests for proposals (RFP) for equipment upgrades.

The result is a comprehensive record of each customer relationship, often stretching back years before Catalyst entered the picture. "Integrating the old data was pretty easy," said Ehler. "We were able to take an existing equipment table and add 40 new fields with a few clicks of the mouse. This would have taken us a ton of work to do manually." One of the best features (in TopLine Designer), she added, was the ability to easily define relationships between the new fields and the existing ones. This makes it possible to immediately integrate new data from a subsidiary into the generation and reporting of overall corporate figures.

Customer

Catalyst Equity Group

Industry

Private equity firm for capital equipment manufacturers

Location

Hutchinson, Kansas

Number of users

115

Product

TopLine Designer with Act! Premium

Scenario

Private equity firm needs quicker, easier integration of customer info between its corporate team and the companies it acquires

Solution

TopLine Designer for Act! with administrator and end-user training provided by TopLine Results Corporation

Outcome

Immediate data compatibility between corporate and associates nationwide, greater comfort level for staff of companies being acquired

Customer service buys in

While the outcome looks attractive, the initial idea of integration can be a tough sell for the customer service team in a newly acquired company. "Over time we've had some resistance on the service side," Ravenstien said. "People tell us, 'this won't work for us…we're using another system.' What we've done is put Act! with TopLine Designer on their system side-by-side with their existing software and run the two simultaneously for a while. It's surprising how quickly people migrate over to Act! once they see how well it works," she said, adding, "we've had customer service people who are now into Act! that never had much to do with their company's old software package."

Quick and easy for IT

While user acceptance is important, IT implementation is an equally essential part of Catalyst's concerns. Fortunately, the roll-out of Act! with TopLine Designer was an easy one for Ehler and Ravenstien. "There were a few stumbling blocks at the very beginning," Ehler recalled, "but the implementation team at TopLine were very available to help whenever I needed them." Ravenstien agreed. "What's good about TopLine is that you don't need to wait until tomorrow," she said. "With some companies you get put on hold, or leave a message and they get back to you the next day. We can't operate that way. I can always get someone from TopLine on the phone or exchange emails for a quick fix. That's a real comfort to me."

Training brings synergy

Catalyst also takes advantage of training services from TopLine Results, which has resulted in an unexpected benefit. Over the course of training sessions with sales staff and customer service professionals, the TopLine team has gained an extensive body of knowledge on Catalyst and its information needs. "Having someone who already knows our business saves us a lot of time," Ehler said. "When we get new employees or a new version of Act! comes along, we don't have to re-orient someone. TopLine already knows what we want, which means we get what we want a lot faster."

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>
> *Jean Ehler*
> *Catalyst Equity Group*

To Ravenstien, training delivered by someone outside of the Catalyst ranks is more effective. "There's a synergy effect that TopLine brings to us, because they see all types of users in all types of industries," she stated. "They learn helpful hints and tricks that we wouldn't have discovered on our own."

Powerful integration

In addition to everyday operational benefits, the capabilities gained from TopLine Results are also an important tool when Catalyst pursues future acquisitions. The easy way that Catalyst can integrate data from a new subsidiary's Act! system dramatically demonstrates the company's skill at bringing a new firm into the fold with the fewest possible hiccups. "It gives us something to show a potential acquisition," explained Ravenstien. "We can talk about the two of us becoming one unit, but it's a lot more persuasive to literally show someone how we've accomplished it, and how well equipped we are to accomplishing it again for their company."

"We talk about the process being a win-win situation for everyone," added Ehler, "but it helps to have the evidence right on the screen. They see how we can get the information we need, while also delivering an efficiency they want as well."

TopLine helps the bottom line

The use of TopLine Designer along with TopLine Results corporate training has also proven to be a winner for those watching the Catalyst bottom line. Both Ehler and Ravenstien agreed that using an outside solution provider is more cost efficient than hiring extra staff to do data integration. "If we didn't have TopLine, we would definitely need more in-house people," said Ehler. "The time an insider would need to complete a project like this would have been excruciating. When you're a department of two, it's good to know that personal support is only a phone call away."

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ABOUT TOPLINE RESULTS CORPORATION
TopLine Results Corporation is a customer relationship management (CRM) consulting firm specializing in Microsoft Dynamics CRM, Act! and Saleslogix. Services include cloud-based CRM via hosted solutions, system design and implementation, and training. TopLine Results also develops custom applications which integrate with Act! and CRM. Headquartered in Wisconsin, with offices in Chicago and St. Louis, our mission is to empower companies with customized CRM solutions which increase effectiveness in sales, marketing, customer service and overall business performance.

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