

## Training Firm Relates Better with Customers to Boost Sales

| EXECUTIVE SUMMARY   |
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| <b>SUNSET LEARNING INSTITUTE</b> <ul style="list-style-type: none"> <li>• Instructor-led Cisco training</li> <li>• Reston, Virginia and Denver, Colorado</li> <li>• 40 full-time employees</li> </ul>   |
| <b>BUSINESS CHALLENGE</b> <ul style="list-style-type: none"> <li>• Slow access to customer data</li> <li>• Need to easily maintain customer information throughout transaction lifecycle</li> <li>• Need to integrate customer-related applications for complete view of customers</li> </ul>                         |
| <b>NETWORK SOLUTION</b> <ul style="list-style-type: none"> <li>• Advanced IP network delivering integrated voice, video, and data traffic</li> <li>• Highly flexible customer relationship management (CRM) software</li> <li>• Connector application bringing CRM functions to mobile phones and desktops</li> </ul> |
| <b>BUSINESS RESULTS</b> <ul style="list-style-type: none"> <li>• Increased sales more than 15 percent through more effective marketing</li> <li>• Customer relationships better maintained through changes in staff</li> <li>• Relations with large, complex customers handled more efficiently</li> </ul>            |

Sunset Learning Institute improves sales and marketing through its network-integrated customer relationship software.

### Challenge: Growing a Business in a Dynamic Environment

Sunset Learning Institute (SLI) is a small, but global training company of 40 employees that delivers learning solutions for leading-edge IT professionals and their organizations. Its training services support a wide variety of businesses, from small organizations with just a few engineers to large enterprise organizations. The training industry is fast-moving and highly competitive. To be profitable and grow its business, SLI must maximize attendance at its classes, minimizing class cancellations that can quickly sap revenue.

“The more students we have in a single event, the more profitable our events become,” says Rick Morgan, CEO of SLI. “Our goal is to try to fill those public events as best we can.”

To sustain customer loyalty and build continued trust over the long term, SLI uses customer relationship management (CRM) software to provide a better understanding of customers and their needs – helping to create circumstances that will fill SLI’s training events.

“We needed to have a 360-degree view of what was going on with our customers,” says Morgan. “We wanted the ability to seamlessly maintain activity records with customers, from the initial prospecting stage, through enrolling the customer in an event. And we wanted to maintain an ongoing partnership with the customer after the event.”

SLI’s previous CRM application provided slow, cumbersome access to customer data, limiting management’s ability to understand and market to customers and hampering efforts to deliver personalized service. Building a strong relationship with clients is critical not just to close an initial sale, but to foster an ongoing – and profitable – partnership over the long term. To take its marketing initiatives to the next level, SLI needed a way to bring together all of its customer communications and CRM applications into a single, intelligent solution that could provide a complete view of customers throughout their lifecycle.

### Solution: In-Depth Customer Knowledge Powers Effective Sales and Marketing

SLI chose a comprehensive solution featuring Cisco® Unified Communications and Microsoft Dynamics CRM. Microsoft Dynamics CRM lets the company handle all of its customer-facing business processes with a familiar interface. The infrastructure of Cisco Unified Communications and Cisco Unified Contact Center Express provides advanced telephony and integrated voice and video conferencing – all over a single IP network. Cisco Unified CallConnector for Microsoft Dynamics CRM integrates Cisco Unified Communications solutions with Microsoft Dynamics CRM at the desktop, without the need for additional hardware.

Together, the solution gives SLI the ability to target, market, and sell its services more effectively to customers, to maximize attendance and revenue at training events.

“There’s a tremendous amount of flexibility within CRM,” says Dale Pederson, SLI vice president of sales. “We can sort opportunities by event, city, date, and so on. If we experience a last-minute cancellation, we can go into CRM and quickly pull up exactly who is waiting for any given event across the U.S.”

The solution also gives managers the in-depth information they need to focus on customers, track all of the company’s customer activities, and market and sell services more effectively over the long term.

“Microsoft Dynamics CRM provides an almost unlimited view of the data we need,” says Morgan. “We can easily drill down to focus on specific data, or we can see an aggregate view in a report. Using the product with Cisco Unified CallConnector for Microsoft Dynamics CRM provides a much better view of what activities have taken place with our sales team, as well as services and operations teams. Plus, we have the 360-degree view of the customer before we even say ‘hello,’ as the Cisco Unified CallConnector for Microsoft Dynamics CRM provides an automatic screen pop of customer information with both outbound and inbound calls.”

**“Even though we are a small business, we can give our staff access to the same customer tools that are being used by Fortune 100 companies.”**

– Rick Morgan, CEO, Sunset Learning Institute

The solution is useful in spotting accounts with little activity, Pederson says. “Instead of having our sales staff wasting time pursuing a dormant account, we can set them aside and refer them to an automated campaign. If a client shows interest, we can move the account back to an account manager for follow-up.”

The Cisco Unified Communications and Microsoft Dynamics CRM solution also helps SLI maintain the continuity of its marketing initiatives. The company can sustain its marketing activities even when key contacts – or its own sales employees – change.

“Like any organization, we have turnover, and the solution has been tremendous in helping us maintain an ongoing relationship with our customers through transition of staff,” says Morgan. “An outgoing sales team member can easily hand off an account to an incoming sales team member. We can even use the solution to transition services from client to client. Many individuals move from one company to another, and maintain a training relationship with SLI.”

### **Result: Increased Revenue Now and in the Future**

The Cisco Unified Communications and Microsoft CRM solution has enabled SLI to take advantage of the type of customer management tools that have traditionally only been available to large organizations. For example, the solution gives the company the ability to view, sort, and manipulate customer contact information. The solution gives SLI a powerful tool to strengthen its customer relationships by marketing to organizations, rather than to individual contacts.

“The solution lets us look at a Fortune 500 customer and realize exactly how many touch points we have with them,” says Morgan. “We can consider how to go up the food chain within the organization to create a much more firm relationship – and a better valued relationship for both sides.”

### PRODUCT LIST

#### Voice and IP Communications

- Cisco Unified Communications Manager
- Cisco Unified Contact Center Express
- Cisco Unified CallConnector for Microsoft Dynamics CRM
- Cisco Unified IP Phones 7900 Series

Pederson says, “We can work with our clients much more intelligently and efficiently. CRM lets us enter contact and account data into the system in a way that is much clearer. We can sort and separate divisions within big companies and efficiently assign staff to work with specific contacts. We don’t have multiple people tripping over one another to call into a large customer.”

Delivering customer service has become more efficient as well, because the Cisco Unified Communications and Microsoft CRM solution lets customer-facing employees be more informed and save time as they interact with clients. Customer-facing employees have access to a wealth of client information whenever they are on the phone, so clients enjoy more efficient, knowledgeable service.

“One of the most laborious things to do inside a CRM system is keep track of incoming and outgoing calls,” says Dan Blake, President of Intelligix, a Cisco Premier Certified Partner that implemented SLI’s CRM solution. “CRM Connector automates most of the steps, and creates an activity record when the call is complete. It probably saves 40 percent of a user’s work, just with a simple screen pop.”

SLI has also adopted an online registration and training center management application. The CourseMax solution, developed by Intelligix, automates training registration and integrates smoothly with the SLI CRM system.

With its network-integrated CRM solution, SLI has rapidly evolved to become a truly customer-centric company, handling new customers more efficiently and marketing to them better over the long term. “Even though we are a small business, we can give our staff access to the same customer tools that are being used by Fortune 100 companies,” says Morgan. “And we’ve been able to increase sales by over 15 percent through more effective sales and marketing and increased customer service, using the Cisco Unified Communications and Microsoft CRM solution.”



**Americas Headquarters**  
Cisco Systems, Inc.  
170 West Tasman Drive  
San Jose, CA 95134-1706  
USA  
www.cisco.com  
Tel: 408 526-4000  
800 553-NETS (6387)  
Fax: 408 527-0883

**Asia Pacific Headquarters**  
Cisco Systems, Inc.  
168 Robinson Road  
#28-01 Capital Tower  
Singapore 068912  
www.cisco.com  
Tel: +65 6317 7777  
Fax: +65 6317 7799

**Europe Headquarters**  
Cisco Systems International BV  
Haarlerbergpark  
Haarlerbergweg 13-19  
1101 CH Amsterdam  
The Netherlands  
www-europe.cisco.com  
Tel: +31 0 800 020 0791  
Fax: +31 0 20 357 1100

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