

Office Goes Paperless with Results CRM

Case Study: Netlink IT

CUSTOMER

Netlink IT

INDUSTRY

IT Consulting

FOUNDED

1999

KEY CRM NEED

Needed to co-ordinate staff and organize documents, projects and processes.

RESULTS PRODUCT

CRM Business Suite

ABOUT NETLINK IT

Netlink IT provides IT Support and Consultancy to small business within the UK. Clients typically refer to Netlink IT as their "virtual IT Department". The company works under the philosophy that all organizations, however big or small, should be given the opportunity to realize the benefits of using technology.

BUSINESS CHALLENGES

Document Organization. Netlink IT needed a way to organize and file client documents and software licenses so that all staff could access the information.

Staff Coordination. Office Administration needed to schedule technicians for onsite calls. In addition, technicians needed access to client information in order to prepare and provide excellent support.

Project Management. With several clients, products and installations, Netlink IT needed a way to organize and view several projects at once.

WHY RESULTS?

Paperless Office. Netlink IT uses Results as an electronic filing system. Documents of any nature, including software licenses, can be easily recovered. All incoming posts (bills, invoices, letters, etc.) are scanned and stored electronically and linked to Results CRM contacts.

Service Tickets. Using the Service Orders module enables the entire Support team to co-ordinate and work together on service tickets without duplicating effort.

Project Management. Netlink IT can easily view the history and current status of any client project.

FAVORITE RESULTS FEATURE

Netlink IT uses the Automatic Processes module to streamline their internal processes. This module allows them to translate their business processes into Results CRM, so that steps are automatically generated and followed by staff. Management can rest assured that processes will be consistent throughout the organization each and every time they are performed.

The screenshot shows the 'Processes' window in Results CRM. The process name is 'Customer Care' with ID 106. The description is 'Activities to complete when account renews Customer Care contract'. Below this is a table with columns for Step #, Activity Type, % Comp, Days, PR, Assigned To, and Override Description. The table contains two rows of data.

Step #	Activity Type	% Comp	Days	PR	Assigned To	Override Description
1	EMAIL	45%	2		Robert	Email Customer Care welcome l...
2	SERVICE-CALL	100%	5		Robert	Call to insure customer has all r...

"Thanks to Results, we are virtually a "paperless office". Results makes it easy for us to recover documents of any nature, and has reduced the need for physical storage."

Richard Tubb, President
Netlink IT