



Imagine Your Entire Organization
Working In Unison...

Customer Information:

Basic Research

Headquarters:

Salt Lake City, Utah

Industry:

Nutriceutical Distributor

Web Site:

www.basicresearch.org

Sage Software:

Sage CRM SalesLogix

Sage MAS 90

DynaLink for Sage CRM SalesLogix

Integrated Solution for Basic Research

Unison Delivers Efficient, Integrated CRM System

Basic Research has grown into a leader in the red hot nutraceuticals marketplace. The company's beauty products and supplements grace the shelves of small health food stores and large retail stores.

The Challenge

As the company's success grew, the limitations of its contact management software became more apparent. Staff had to visit various non-integrated applications and sources to obtain a complete picture of the company's relationship with its customers. The overhead of managing its larger customers and providing them with the attention and service they demanded was costly.

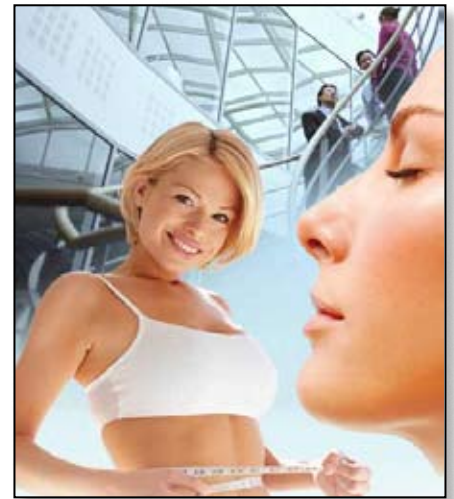
Jeff Stott, IT director at Basic Research, envisioned a single application where staff could view all customer-related information, from terms and credit balance, to open proposals, to detailed item sales history, to yesterday's conversation with the buyer. "We didn't want sales personnel in the accounting application," he recalls, "We wanted to give them a sales tool that will allow them to focus on our customers. At the same time, though, they needed access to information from the accounting application, like open invoices, payment history, and credit information."

A Well-Researched Solution

The company's accounting software provider introduced Basic Research to Unison, Inc., a Sage CRM SalesLogix business partner headquartered in Provo, Utah. Unison has a proven track record of implementing customer relationship management solutions that deliver an immediate and measurable return on investment.

"Unison was able to get right to the heart of

what we needed, speaking to our users and developing a solution that fits us perfectly," says Stott.



For Basic Research, Unison designed and implemented a solution tying together its Sage MAS 90 ERP accounting solution, its EDI application, and Sage CRM SalesLogix solution.

One Location. All The Answers

Sage CRM SalesLogix has become that single source of information that Stott sought—an interactive portal that extracts information from multiple data sources and brings that information into a cohesive customer-focused application. "Now we have a single location that provides a window into all customer activity," says Stott.

The solution allows for the free flow of information between the applications, with real-time electronic order information flowing from the accounting application into Sage CRM SalesLogix. Orders that are not received via the EDI system are entered directly into Sage CRM SalesLogix

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About Unison

Unison has been at the forefront of the Customer Relationship Management (CRM) and sales force automation evolution since 1996. Bringing a combination of product expertise and real world business experience, our consulting staff is uniquely qualified to design and implement CRM solutions that immediately deliver on their investment. Our clients include a wide range of industries and businesses from small start ups to large enterprise organizations such as American Express, Intel, and Merrill Lynch.



and then flow into Sage MAS 90, which in turn sends updated and payment and credit data back to Sage CRM SalesLogix. Sales representatives have access to the full catalog of inventory items from the accounting application. In addition, Unison created sophisticated item discounting logic to match Basic Research's sales model.

Unison configured personalized dashboards that deliver user-specific sets of data on a single screen. Busy managers see real-time accounting data such as period-to-date sales figures, top-selling items, and successful sales people, for example.

Streamlined Operations

Managing large and vitally important accounts like Wal-Mart can take a great deal of time. Basic Research needed three full time employees to monitor daily order activity and ensure delivery by the required dates. With the efficiencies gained by the new system, Basic Research was able to dramatically cut its administrative time, saving thousands of dollars each year. The seamless integration of Basic Research's EDI, accounting, and sales systems provides staff with direct access to

the status of each customer order. Orders can be monitored and tracked in real time and customer inquiries responded to quickly. What used to require a full-time staff of three is accomplished in just a few hours each day.

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Unison has given Basic Research insight into consumers' buying habits, allowing it to strategically market and position its products. Management can see immediately which products are selling at which store locations.

“We can make strategic decisions using this information—if we know a particular product is selling well at one store, we can recommend it to other, similar stores,” explains Stott.

Sage CRM SalesLogix has proven to be an extremely effective forecasting tool. By tracking opportunities and analyzing the sales pipeline, Basic Research can make informed buying decisions to ensure it has the products it needs in stock when it needs them.

Unison has invigorated Basic Research's business model, providing it with the integrated solution it needs to succeed.

unison

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