

HELP[®]

SOLUTIONS



Our Expertise. Your Peace of Mind.

History

HELP Solutions was established in 1995 and is the only Business Partner in Louisiana certified to implement the biggest names in the Customer Relationship Management (CRM) software industry--including SalesLogix and Sage CRM. Each of these products provides a single system that integrates critical business operations, such as sales, marketing, customer service and accounting, while creating accurate and up-to-the-minute views of business data.

Patricia Welther, HELP's President and Chief CRM Specialist, talks about our unique methodology for implementing CRM:

“There are three parts to successful implementation of a customer relationship management solution-- People, Process and Technology-- always in that order. Technology should serve our clients' business objectives, therefore, it should be integrated with the right processes and make their people more productive.”

HELP's team of business process and technology consultants can help clients maximize existing CRM software or recommend a new product that best matches a client's business requirements, budget and culture. With our solutions and expertise, your organization can increase sales success, deliver superior customer service, make informed business decisions, and improve collaboration among various departments.

Although no business is too large or too small to benefit from HELP's services, some of the more recognizable names on our client list include Turner Industries, Office of the Governor, La Dept. of Economic Development, Regal Nails, Lofton Staffing, Lard Oil, Office of the Lieutenant Governor, Baton Rouge Business Report, CenterPoint Energy and hundreds of others. What each of these diverse businesses have in common is a desire for continuously improving the relationship with their customers, and with HELP's assistance and ongoing support, they are doing just that.

At HELP Solutions, our success is measured by how successful our clients are at managing and executing the most critical areas of acquiring and retaining their most profitable customers.

Mission

Our primary aim is to directly affect the economic progression of our region by aiding premier organizations in improving the effectiveness of their people, the efficiency of their business processes, and the utilization of technology as a foundation for organizational growth.

Philosophy

HELP Solutions strives wholeheartedly to exemplify those characteristics that create a memorable customer experience. After all, we exist to serve our client base. We acknowledge that these expectations form the foundation of customer satisfaction, and we work exceptionally hard each and every day in these areas:

- Expertise – we must continually strive to reach the pinnacle of knowledge and problem-solving abilities in our service offerings.
- Entrepreneurship – to help businesses, we must lead by example and have an understanding and zest for entrepreneurship.
- Passion – we must always act with enthusiasm and compassion; we must love what we do and be excited about serving our customers.
- Integrity – we must discipline ourselves to do the right thing; nothing should ever stand in the way of doing what is right.
- Trust – customers value and trust our recommendations; we continually strive to be worthy of this trust.
- Responsiveness – we must recognize that businesses require quick and accurate response to their business problems; we must continually strive to seek out the balance between timeliness and quality.
- Continuous Improvement – we must always improve ourselves and our organization in such a way that we continuously increase our value to our customers.

Sage CRM

Sage CRM is an easy to use, fast to deploy, feature rich, low cost of ownership solution, designed to introduce the real benefits of CRM to small and middle sized companies. Sage CRM aggregates individual and group efforts across sales, marketing and support teams, making people and companies more efficient at their roles. It links all departments to a single system that is deployed across an Internet architecture that inherently provides efficiencies in terms of deployment, maintenance and access.

With out-of-the-box integration with ERP solutions, such as Sage MAS 90/200, Sage CRM lets you view critical customer data from the back office and provides your staff with true 360° visibility into customer interactions.

Benefits of Sage CRM:

- Scalability- manage growth and maximize returns
- Adaptability- easy-to-use customization tools, which allow you to quickly modify many aspects of the system and adapt the software to your changing business
- Automated Workflow- embed and automate your best practices for sales, service and marketing; control and direct communication
- Rapid Deployment- easy to deploy, manage, and modify; can be implemented now, not months or years from now
- Integration with Business Applications- integrates with Outlook, Legacy systems, back-office systems, corporate databases, and partner/public information systems

“Sage CRM took the guess work out of our sales process. With a workflow mapped out, we don’t miss important tasks. And management can see the current status of each prospect at any time.”

—Joel Meariman
Controller
Smoothie King Franchises, Inc.

Sage SalesLogix

SalesLogix is a CRM solution that enables small to medium-sized businesses and divisions of large corporate organizations to acquire, retain, and develop profitable customer relationships. It provides a complete account centric solution designed to enable your sales, marketing, and customer service and support teams to improve the management of their relationships with customers and prospects.

SalesLogix's strength lies in its ease of use and ability to fit seamlessly with any organization's unique sales and customer interaction process. Its powerful customization and configuration capability allow it to be easily tailored to meet the needs of your business more rapidly than any other CRM product.

Benefits of Sage SalesLogix:

- Sales- increase productivity and performance by automating key aspects of the sales cycle
- Marketing- easily segment customers and prospects for effective targeting, gain critical visibility into campaign budgets and direct revenue impact
- Customer Service- easily locate customer information and resources, allowing you to resolve customer questions, issues, and requests quickly
- Reporting- analyze sales campaigns, efficiency, sales team performance and more with pre-made or customized reports
- Organization- organize data sets by grouping similar records using advanced query tools, export groups to excel with one click for additional analysis
- Integration- easily integrate to back-office accounting and financial applications, as well as Outlook

"Our challenge was to combine our wealth of customer information into one database. We chose SalesLogix for its data reliability and remote access options. We chose HELP Solutions for their expertise in aligning the sales strategy with the data management process. With their experience, we achieved implementation in record time."

- Thomas Turner
Vice Chairman and Chief Operating Officer
Turner Industries Group

Swiftpage

Swiftpage is a full service email marketing solution completely integrated into SalesLogix and Sage CRM. It is dedicated to providing your business with the tools to effectively and automatically communicate with your customers in order to build a profitable relationship.

Benefits of Swiftpage:

- Marketing Automation- put your sales and marketing initiatives on cruise control with Swiftpage Drip Marketing
- Sales Force Automation- control outbound marketing content and know who your most interested contacts are- track opens, clicks, opt-outs, email forwards and more
- On Demand Marketing- deliver the right content, send contacts to the right place and gather the right information
- Integrated- do all your Swiftpage activity directly from your contact database - no need to ever leave
- Gather Valuable Data- create and add surveys and registration forms to your emails or on your website - get responses instantly
- Template control- use pre-built templates or customize your own

“Swiftpage is very quick and easy to implement and offers much in terms of efficiencies and customer intelligence. It has provided immediate benefits to our customer event planning and gathering of customer input.”

- Sherry Poimboef
Customer Excellence Representative
CenterPoint Energy

At **HELP Solutions**, our goal is to find the right software for your organization. We meet with clients routinely to discuss their needs and identify how CRM will maximize their efficiency, productivity, and revenue. In addition to general product and business consulting, we also offer many services to better serve our clients.

- **Training-** We can train your team at our private, fully equipped, state-of-the-art training facility or we can come to you. Training is delivered in a format that is customized to you and your users, allowing you greater flexibility, more control and stronger results.
- **User Adoption-** Effective user adoption is the most important element to a successful CRM implementation. We offer recurring services geared towards ongoing training, process re-engineering, and best practices. We continue to support the development of your users.
- **Installation-** Installation of CRM software includes LAN, remote, web, and mobile environments, so your key business systems are accessible in the office or on-the-go.
- **Data Migration and Application Integration-** Data is imported into the CRM software and integrated with departmental applications by our team to provide clients a solution that is easy-to-use and empowers every aspect of a company's operations.
- **Customization-** We customize SAGE applications to suit your company's specific functional or integration requirements.
- **Customer Support-** Post implementation, our team is ready and waiting to offer technical support to your staff, answering questions and helping you continue to develop and grow.

"HELP Solutions took the time to truly understand our complex business needs, so they could give me the precise solution I needed to effectively perform my job."

- Stafford Kendall
Business Development Manager
EATELWEB

Patricia Welther - President & C.E.O.

patricia@helpcrm.com, 225.928.3121



Patricia has successfully led Louisiana's top CRM consulting firm since 1995, around the time CRM established itself as a powerful and necessary tool for maximizing organizational effectiveness. Her expertise lies in her comprehensive knowledge of leading CRM solutions and on her proven ability to mastermind enterprise-wide solutions that produce the desired return-on-investment our clients expect. Other notable specialties include the deployment of nurturing programs, lead and opportunity management systems, and processes that ensure no client or prospect goes unnoticed by "falling through the cracks."

Besides business, Patricia enjoys teaching and mentoring youths through ministry at church, volunteering in the Public Schools, teaching at University of Phoenix, and community involvement. She is a licensed Engineer with a B.S. in Petroleum Engineering, M.S. in Engineering Management, and a Master in Theology.

Chris Burriss - Vice President of Operations

chris@helpcrm.com, 225.928.3121



Chris is the primary driving force in maintaining the high level of expertise needed to design and implement CRM solutions for HELP's top-notch customer base. He works closely before, during and after the CRM implementation to offer improvements on workflow and organizational effectiveness. As a past entrepreneur with an immense interest in operations and a 10-year history of engineering software solutions, he is able to effectively bridge the gap between technical implementation and business know-how. Above all else, Chris' focus is on ensuring that services rendered by HELP provide significant value to its customers.

Chris is a certified Project Management Professional and member of the Project Management Institute. In addition to being a Sage-certified consultant, he also boasts a myriad of technical accomplishments within the Sage Software product line, including Engineer and Developer certifications for SalesLogix LAN, Web and Mobile solutions.



CENTERPOINT ENERGY

With its headquarters in Houston, TX, CenterPoint Energy operates in five primary businesses: electric transmission and distribution, natural gas distribution, interstate natural gas pipelines, field services, and competitive natural gas sales and services. Independent surveys positively reflect the company's commitment to customer service excellence. To help deliver on its customer service commitment, the CenterPoint Energy Pipeline and Field Services division turned to Sage SalesLogix and the capable consulting team at HELP Solutions.

Challenge

CenterPoint had no cohesive system for managing its customer relationships. Sherry Poimboef, a customer excellence representative for the company, explains:

“Our ERP (Enterprise Resource Planning) system had some of the information, we had a couple of Access databases that held other information, and sales representatives all had their own spreadsheets, but there was no place where we could see the complete details of our customer interactions. We needed scalability, flexibility, and the ability to interface with our ERP system.”

A change in management prompted an overhaul in the company's system. To move to a more customer-centric business culture, it needed a CRM (Customer Relationship Management) system that would serve as a centralized database.

Solution

CenterPoint Energy Pipeline and Field Services division evaluated several solutions, but with help from HELP Solutions, soon singled out Sage SalesLogix as its choice. “HELP has excellent consultants who analyzed our needs and growth plans and helped us make the best decision,” says Poimboef. “The user-friendly interface of SalesLogix, broad customization capabilities, and the ability to

interface with the company's mainframe ERP software were all selling points."

HELP Solutions worked with the IT department at CenterPoint Energy to design and implement an import utility to bring data from the ERP software into Sage SalesLogix.

Results

HELP Solutions customized Sage SalesLogix to meet many of the company's unique requirements.

360° View of Customers

The company's customer service staff relies on SalesLogix to provide a comprehensive view of customers and to help the company remain in compliance with federal and state regulations that govern the energy industry.

Information When and Where It Is Needed

"We work from several offices across many states, so the remote access capabilities of the software are vital to us. Workers from the field or another office can access the main database to view and enter up-to-date information," says Pimboef.

"The engineers are out in the field, yet the communications regarding the permit process come to our main offices. When we update the status of each project in SalesLogix, an e-mail message is sent to the engineer so they always know what's going on. This is definitely a case where time is money, because the minute we obtain the permit, we can begin generating income."

The company's field service personnel utilize SalesLogix to track problems or service issues with the pipelines, creating a Service Ticket to assign responsibility and track resolutions. "The goal is to improve our service and reliability by tracking the nature of our service calls over time, identifying and eliminating problem areas."

Pimboef has nothing but praise for the consulting team at Help Solutions. "They are great to work with," she concludes. "I really feel like they work in partnership with us to make this project a success."

"HELP Solutions did a great job for us. The project was a success, and at a very reasonable cost."

- Sherry Pimboef
Customer Excellence Representative
CenterPoint Energy



LOUISIANA DEPT. OF ECONOMIC DEVELOPMENT (LED)

The mission of Louisiana Economic Development is to provide excellence in leadership, policy and programs to create a business climate enabling public-private linkages, which result in capital investment, a diversified economic base and quality job opportunities for all Louisiana citizens.

Challenge

In August 2005, the Louisiana Department of Economic Development (LED) was looking for a CRM system to replace GoldMine, which they had outgrown after more than ten years of use. In the midst of comparing solutions, hurricanes Katrina and Rita struck the Louisiana coastline.

Under normal circumstances, LED is the state agency charged with attracting new business and industry to Louisiana and providing economic development services to resident industry, small businesses, and entrepreneurs. However, after the hurricanes, LED was suddenly tasked with providing emergency assistance to affected businesses and their employees throughout the region.

Solution

In the months before the disaster, LED had been working with HELP Solutions to identify a replacement CRM solution. Immediately after Katrina hit, LED turned to HELP for advice on applying CRM in a disaster-recovery situation. HELP recommended Sage CRM as the optimal technology to support both their immediate and long-term needs. Linda Regira, Director of Policy and Planning, stated:

“Based on past experiences, LED assumed all CRM packages would be cumbersome and inflexible. That myth was quickly dispelled when we took a Sage CRM crash course.”

Results

LED decided to proceed with Sage CRM, and within three days of implementation, LED personnel were logging critical hurricane-related data.

Using Sage CRM to Assist Affected Businesses

LED established hotlines where businesses could communicate their status. Staff catalogued every email and call, and assigned follow-up tasks in Sage CRM. LED ran reports to determine the areas in greatest need, allowing them to appropriately allocate resources.

At the 2006 Governor's Conference on Economic Development, Secretary Michael Olivier stated, "After hurricane Katrina, by getting up and running quickly with Sage CRM, we were able not only to help our displaced businesses right away, but we were also able to be accountable to the Governor about who we helped, when we helped them, and what we did for them."

Improving Financial Accountability

Although still assisting businesses in hurricane recovery, LED is now using Sage CRM in a more traditional fashion. The agency has launched two major marketing campaigns, promoting financial incentives for setting up business in Louisiana. LED utilizes the Campaign functionality to track Leads and Opportunities as they progress toward becoming Companies (i.e. local businesses).

LED staff tracks brochure mailings, follow-up calls for campaigns, hiring incentives and workforce development programs. Managing projects in Sage CRM helps LED to report regularly on the state's development efforts to the Governor and tax payers.

Looking ahead, LED plans to integrate its proprietary incentives tracking application with Sage CRM to build company profiles reflecting direct business assistance and other opportunities provided by LED. The program will help LED identify how to best assist these businesses in the future.

"We didn't have time to dwell on what we were doing. We sat down with HELP Solutions and told them what we needed Sage CRM to do and they ran with it. On the first day, they managed to train us in an hour and our users actually knew what to do. It was amazing."

- Linda Regira
Director of Policy and Planning
Louisiana Department of Economic Development



NAVIGATION ELECTRONICS, INC.

The GPS (Global Positioning Satellite) system in your car might show you where you are within a few feet, but professional surveyors need accuracy to within a few inches. These professionals, including state governments and municipalities, turn to Navigation Electronics, Inc. for the precision GPS tools their jobs demand. To effectively manage its customer relationships and capitalize on new sales opportunities, Navigation Electronics relies on Sage SalesLogix and the top-notch consulting team at HELP Solutions.

Challenge

“We were using Goldmine up until a year ago,” recalls Kelli Guidry, director of operations for Navigation Electronics. “Each salesperson was running it on their laptops, essentially just to track appointments and tasks. There was no visibility for management into those databases, so we had no easy way to determine what the representatives were working on and what opportunities they were pursuing. We knew we needed a better tool, but weren’t sure how to go about getting one.”

Solution

Guidry performed some research over the Internet which led her to HELP Solutions, a Sage Software Authorized Partner. The consultants from HELP Solutions met with Navigation Electronics, evaluated the existing system and discussed goals and objectives. “They worked with us to fully understand our business needs and then recommended that we move to a full-fledged CRM solution,” says Guidry.

The company considered several options before deciding on Sage SalesLogix. “HELP Solutions showed us how its flexibility and customizability would work well for us,” says Guidry. “In addition, Sage SalesLogix interfaces with Sage MAS 90 ERP, our back-office solution.”

Results

Since implementing Sage SalesLogix, Navigation Electronics has enjoyed a significant sales boost. Kelly Guidry explains:

“Using SalesLogix has freed up time by eliminating redundancy and manual tasks. We’ve used that time to focus more on selling, and the results are very positive.”

Anytime, Anywhere Access

The company’s remote sales representatives have the advantage of a locally installed CRM solution that they can access on their laptops even when Internet connectivity is not available. The company has the advantage of a single database containing the full details of its customer relationships; the remote databases are synchronized each time the representatives connect to the Internet. The single database delivers distinct advantages, Guidry says. “Now all information is stored in SalesLogix, so everyone who accesses the customer record has a clear picture of what’s going on.”

Streamline Opportunity Tracking

HELP Solutions implemented a sophisticated quoting tool within SalesLogix. “Before we used spreadsheets to perform the pricing and configuration for our proposals,” explains Guidry. “HELP Solutions built this functionality into SalesLogix so that we can simply e-mail the quotes to customers and maintain a record of that correspondence in SalesLogix.” Management now has complete visibility into each representative’s open opportunities, which results in faster, more accurate sales forecasts.

Interface with Back Office

Front and back office integration boost productivity across the company and allows more time for revenue-generating activities. “Our representatives can see open orders, invoices, and payment information from within Sage SalesLogix,” says Guidry. “They no longer have to call the office to find out the status of an order, which means they have more time for selling.”

“It’s a fantastic product—and the reason it works so well for us is due to our partnership with HELP Solutions. With a sophisticated product like Sage SalesLogix, the business partner’s skill is critical to the success of the project. HELP Solutions comes through for us every time.”

- Kelli Guidry
Director of Operations
Navigation Electronics, Inc.



SMOOTHIE KING FRANCHISES, INC.

Back in 1973, Smoothie King's founder blended up a concoction of fruit and protein powder and started a craze. Headquartered in Covington, Louisiana, the company now has over 430 store locations in 34 states and Seoul, South Korea. Their smoothies please guests with delicious blends of real fruits, pure juices and nutritional supplements available in over 50 flavors.

Challenge

As a franchise operation, Smoothie King's success depends on communication with potential and existing franchisees. However, the Smoothie King staff was relying on Outlook to store and track their communications, and this lack of a cohesive system was beginning to threaten growth. Joel Meariman, Controller, explains:

“We had more than 50 people—all with multiple e-mail folders pertaining to our franchisees. It was unworkable—we needed a way to centralize this information. Our franchisees might speak to one consultant on Monday and get one answer, and then call again on Tuesday, speak with another consultant, and hear something new.”

Management was concerned that inconsistent information was being shared with franchisees.

Solution

After consulting with HELP Solutions, the company realized it needed to implement CRM. Sage CRM supplied the best fit for Smoothie King- a perfect mix of features, functionality, and scalability.

“We need to deliver consistent corporate messages, and record the results of each customer interaction in order to give the best service possible. Sage CRM lets us do that—and much more,” says Meariman.

Results

Sage CRM provides Smoothie King with a centralized database that ensures corporate communication is consistent, resulting in better customer service. Visibility into the sales pipeline helps keep staff accountable and management informed.

Automated Workflow

Smoothie King leverages Sage CRM's power of automated processes to manage critical steps that turn a prospect into a franchisee. A capture utility sends requests logged on Smoothie King's website directly to Sage CRM to begin the qualification process.

"Sage CRM took the guess work out of our sales process," says Meariman. "With a workflow mapped out, we don't miss important tasks. And management can see the current status of each prospect at any time."

Productivity Gains

Staff can attach financial statements, franchisee agreements, real estate requirements—even photos of the store locations to a contact record in Sage CRM, and make them accessible to other staff members. There is no need to hunt through file drawers- all customer-related documents can be viewed onscreen, printed, or emailed to a customer as requested.

"The productivity gain with Sage CRM is huge," explains Meariman. "We are no longer yelling down the hall or wasting time trying to locate correspondence held in an individual email message."

Insight into Pipeline

Smoothie King's staff uses searches in Sage CRM to isolate groups such as open stores, pending stores, or stores located in certain territories. This ability to rapidly identify subgroups of prospects and customers gives Smoothie King new insight into its operations. Management has access to reports that provide a complete picture of the sales pipeline and where each lead stands. "Before I had to ask every consultant for a list of the leads they were working and the status—Sage CRM has made us more accountable," says Meariman.

"I feel like we've just scratched the surface of what Sage CRM can do. The more we use it, the more areas we see where it can help us improve. We have over 400 stores now, but with Sage CRM I feel we could grow to 1400 and not reach its limits."

- Joel Meariman
Controller
Smoothie King Franchises, Inc.



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September 26, 2008

RE: Letter of Recommendation

To Whom It May Concern:

HELP Solutions is one our top Business Partners in the Central Region year in and year out. They consistently finish near the top in the overall client satisfaction standings every year. HELP Solutions is the consummate business consultant, focusing on their clients, people and processes in order to recommend the most valuable software solution. They have an in-depth CRM and Business Intelligence expertise, and are phenomenal at identifying the customer's needs right out of the gates. HELP is certified on a variety of Sage products and does a great job of solution selling based on the client's requirements.

They have a very impressive customer base that ranges all over the Country. In fact, one of their clients recently won the Sage Customer Award for Community Stewardship which was given to one outstanding organization worldwide, which uses CRM to improve and emphasizes the local, national, or global community in an effort to better the lives of the people who the organization strives to serve.

Patricia Welther has built an extraordinary organization from the ground up, with talented and honest individuals there to support any organization's CRM needs. It is my pleasure to recommend them to you!

Sincerely,

Andrew Vick
Regional Sales Manager, Central/Rocky Mountain
Sage
Sage. Your Business In Mind.

AIMS, Inc.	LA Office of Lieutenant Governor
American Utility Metal	Lard Oil
Associated Terminals	LCF Enterprises: Fritz Institute
Baton Rouge Business Report	Lofton Staffing Services
CenterPoint Energy	LUBA
Central Oil	LWCC
Compliance EnviroSystems, LLC	Mail Dominance
Concepts Electronics	MCG Business Solutions
Conco	MIS Technology Group
Cook Moore and Associates	Navigation Electronics, Inc.
CS3 Technology	Odom Hydrographic Systems
Eagle Industries	Onsite Fuel Service
Evergreen Tank Solutions	Pac-Tec, Inc.
Fire and Safety Specialist	Point Eight Power
GAC International	Raintree Essix
Gilmore Auction & Realty	Regal Nails
GNO, Inc.	Roofing Solutions
Gulf South Business	Smoothie King Franchises
HSLI	Southern Title
K-Tek	SSA Consulting
LA Dept of Economic Development	Thompson Equipment Company
LA Dept of Administration	Turner Industries
LA Dept of Agriculture and Forestry	Wells Fargo
	Whitney Bank

Contact us today and let us HELP your organization create customers for life:

HELP Solutions

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