

→ SUCCESS STORY

The Challenge ...

CenterPoint Energy Pipeline and Field Services was operating without a cohesive customer relationship management system. With data contained across multiple solutions including within their ERP & Access Databases, as well as in individual employee spreadsheets—management was unable to get a single overview of customer interactions.

The Solution ...

HELP Solutions presented two options which were compared side by side. CenterPoint Energy ultimately chose Sage SalesLogix due to its user-friendly interface, broad customization capabilities, and its ability to work seamlessly with their ERP software. HELP Solutions then customized the software to meet CenterPoint Energy's unique requirements.

The Results ...

Employees can access the singular database from anywhere entering up-to-date information. Every conversation and contract negotiation are now stored in one place providing accessibility to data and ensuring regulatory compliance. CenterPoint Energy is confident in their ability to improve their service and reliability by tracking the nature of service calls made over time, identifying and eliminating problem areas.

With its headquarters in Houston, Texas, 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 turns to Sage SalesLogix and the capable consulting team at HELP Solutions.

A Customer-Centric Business Model

Before the CenterPoint Energy Pipeline And Field Services division implemented Sage SalesLogix, it had no cohesive system for managing its customer relationships. "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," explains Sherry Poimboef, customer excellence representative for the company.

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. "We needed scalability, flexibility, and the ability to interface with our ERP system."

A Powerful Solution And Partner

The CenterPoint Energy Pipeline And Field Services division evaluated several



solutions, but soon singled out Sage SalesLogix as its choice. "We compared two systems side by side for a month, and Sage SalesLogix was the hands-down winner," Poimboef explains.

The user-friendly interface, broad customization capabilities, and the ability to interface with the company's mainframe ERP software were all selling points. "Help Solutions represented both products we compared," says Poimboef. "They are excellent consultants who analyzed our needs and growth plans and helped us make the best decision."

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

A 360-Degree View Of Customers

HELP Solutions customized Sage SalesLogix to meet many of the company's unique requirements. CenterPoint Energy enters into contracts with its customers, and HELP Solutions created a new entity in



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www.centerpointenergy.com

Company Profile

Type of Business:

Energy Pipeline and Field Services

Headquarters:

Houston, TX

System Profile

Sage SalesLogix

Sage MAS 90 ERP

HELP Solutions

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Sage SalesLogix for Contracts where detailed information concerning each customer contract is stored. “They added several tabs to logically organize the data, and several new fields to track data unique to contracts,” says Poinboef.

The company’s customer service staff relies on Sage 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. Customer contracts are scanned and attached to Company and Contract records. “As a publicly held company, we’re subject to the Sarbanes Oxley Act. Sage SalesLogix helps us remain in compliance by storing electronic copies of the executed contracts in a accessible and secure manner.”

Notes of every conversation and every contract negotiation meeting are stored within the software, further ensuring compliance with industry regulations.

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 Poinboef.

HELP Solutions created another new entity within Sage SalesLogix to track the process

of constructing new pipeline connections. Previously, one of the company’s engineers had to baby-sit the process of seeking and obtaining the necessary permits. Today, the engineer is notified of important milestones in the permit process through automated alerts.

“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 Sage SalesLogix, an e-mail message is sent to the engineer so they always know what’s going on,” says Poinboef. “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 Sage 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,” says Poinboef. ”

Poinboef 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 works with businesses to develop and implement Customer Relationship Management (CRM) solutions. We help improve the effectiveness of your people, streamline your processes, and utilize technology to increase customer retention and profitability.



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