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Real Life Success: Sales Team Management

World Family Financial uses Intranets.com to manage
and empower their sales team



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World Family Financial Oregon

The financial industry is fiercely competitive and companies are implementing more sophisticated tactics and faster methods to identify, track, qualify, and manage their leads to gain an edge on the competition. However, many smaller organizations have limited funds or expertise to develop sophisticated lead management systems on their own. Or, they simply do not need many of the extra features bundled into systems that are more expensive. The common tactic is to utilize standardized software currently available, and simply accept the inherent limitations.

World Family Financial (WFF), a small financial services firm in Oregon faced similar challenges when the mortgage and securities markets began to aggressively expand. WFF had been using Microsoft Outlook® for their scheduling needs and ACT! ® to manage and track their sales leads. Data and mortgage rate information was circulated manually and by e-mail. The challenge was how to speed up delivery of a large volume of current and relevant financial data to their sales team. They realized their current system was inefficient and cumbersome. WFF needed to find a better way if they were going to be successful.

“We initially considered building our own corporate intranet,” says WFF CEO Isaac Voss, “but the time and cost equation simply didn’t make sense for us. We wanted to focus on our business—not on implementing technology.” WFF initially looked to Intranets.com for an easy way to combine scheduling and lead tracking. They soon found Intranets.com’s other features gave them the ability to do exactly what they needed.

“Intranets.com gives us a central online meeting place where we can access all of the collaboration tools we need to run our business,” Voss says. “We use the service daily to manage group schedules, assign tasks, post important documents and even share mortgage rates with our staff.” And because they receive thousands of sales leads, being able to get in contact with a qualified potential customer as soon as possible gives them a competitive edge.

Voss also likes Intranets.com’s ability to let his team efficiently collaborate on documents, key presentations, and reports, regardless of where they are geographically. The sales team easily stays in touch with the home office, keeping up on all of the latest news, data, and company information. They simply log on to the site, find the information they need

“One of Intranets.com’s greatest assets is its ability to track and manage the progress of THOUSANDS of sales leads.

We input new leads into our Intranets.com databases daily and can distribute the information to our staff instantly. This is unique to Intranets.com and has eliminated our use of other database applications like Outlook and ACT.”

- Isaac Voss
CEO
World Family Financial



“Overall, Intranets.com offers a set of “best-in-class” collaboration tools that have become vital to our organization’s success. ”

- Isaac Voss
CEO
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and make the necessary changes or updates, and upload back to the site. Then everyone has access to the most current version of the document.

Voss was especially impressed with the overall simplicity of setting up their corporate intranet with Intranets.com and its cost-effectiveness. “Intranets.com had us up and running in minutes, providing a valuable service at a reasonable monthly fee and offering flexible terms”, said Voss.

WFF was able to get control of their information, schedules and more, giving them the ability to not only effectively compete in the market, but to grow as well. “Intranets.com has become an essential part of our core business. In fact, it is the “homepage” for every employee.” Voss said.

