

Partners for Success and Innovation (PSI) - Project Overview

Partners for Success and Innovation (PSI), located in Twinsburg, Ohio, is a leader in providing school system support.

A central management tool at PSI is their Customer Relationship Management (CRM) system, which tracks staff involvement with each school system client and helps maintain healthy client relationships.

The Customer Relationship Management (CRM) Challenge

PSI's legacy CRM system was an off-the-shelf package that required data uploads to maintain currency. The legacy CRM was not customizable toward PSI's specific business processes. PSI staff use of the CRM was lacking because screen views were small and restrictive, and navigation within the CRM was cumbersome. The end result was an ineffective CRM because currency and completeness of information within the system was always questionable.

The Solution

The CRM system installed by Adatasol offers many advantages over the legacy system.

As soon as data is entered into the system, it is live and current; there is no need for updates, which saves PSI staff time and gives the information greater credibility.

The pop-up boxes for data entry within the Adatasol CRM system are larger, so data is entered quickly and with less frustration.

The system installed by Adatasol allows for editing of CRM data fields to more accurately reflect PSI's business terminology – for example, each account is identified as a “client” instead of a “customer.”

PSI staff can perform in-house CRM administration and training on basic CRM use without the need for any outside assistance. As examples, staff can perform queries and run reports at their convenience, using the criteria that they select; and staff can train new CRM users with ease because the system is simple to operate and to explain.

The CRM system installed by Adatasol is versatile and powerful enough that it allows for outside documents like client surveys and account evaluations to be captured and paired within each client file.

Conclusions

Compared to the legacy CRM, the solution installed by Adatasol is more broadly used by the staff at PSI. The reliability and currency of information within the CRM is substantially improved.

Management's situational awareness of each client's account is enhanced. If a client calls PSI to discuss their account, the management team is confident they can hold a live conversation with the client using up-to-date information from the CRM.

With the ability to access evaluations and surveys within each client account as part of the CRM, PSI's management can better direct staff activities and ensure each client remains satisfied.

Because the CRM system is so easy to learn and operate, more staff time is available for other important work at PSI, which reduces staff overhead costs.