



Customer Relationship Management (CRM) Software



Diefendorf Capital Planning Associates Soffront Success Story

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Monroe Diefendorf, Jr,
CEO,
Diefendorf Capital Planning Associates

Business Challenge:

- Optimize workflow
- Automate processes
- Increase productivity without increasing staff
- Provide a companywide flexible solution from anywhere
- Implement a solution that would grow with the company

Solution:

- Soffront CRM

Results:

- Implemented efficient, web-based. integrated solution
- Optimized workflows and automated processes
- Applied processes that “pushed” instead of “pulled” information
- Improved efficiency, productivity using vendor portals, office anywhere, 360 degree dashboard
- Configured application for total wealth management

- Increased revenues by 300% in 3 years
- Grew business without increasing staff

Many people see financial planning as a complex and difficult endeavor, especially in today's uncertain economic environment. Not so, says Diefendorf Capital Planning Associates, (DCPA), a financial management firm, located on the North Shore of Long Island, New York.

According to Monroe Diefendorf, Jr., CEO of DCPA (www.diefendorfcapital.com), the firm takes the complexity out of investing, preparing for retirement, and preserving wealth. "Our goal is to strengthen families not just by addressing their financial wealth, but by looking at their total wealth, including their personal and social wealth."

DCPA is constantly searching for ways to become more effective in achieving their goal. This search led them to Soffront Software (www.soffront.com), the CRM pioneer who has been implementing CRM for the last 17 years.

Taking it to the next level

In 2006, Diefendorf determined that it was time to take DCPA to the next level. "We had taken ACT! to the limit; we were definitely a power user of the software," he recalled. "But it wasn't providing us with the tools we needed to manage a growing business. We needed a software solution that allowed us to be more efficient—to automate and optimize our business processes."

Diefendorf researched more than ten different software packages, beta testing each for hours. He found that each of them emphasized a different aspect of traditional financial planning, such as accounting, asset management, insurance, etc. But he was looking for something that did more than just the traditional. "We were looking for something more in line with business process management—something that would optimize our workflow."

During his lengthy search, Diefendorf discovered Soffront Software, a CRM pioneer since 1992. Soffront spans the enterprise with integrated CRM solutions and is designed to readily adapt to a company's processes, workflows, and users.

"Soffront gave us the biggest bang for our buck," summarized Diefendorf. "Although the software wasn't specifically built for our industry, we could easily adapt it to meet our needs. It had the processes and workflow we were looking for."

In 2006 DCPA installed several Soffront modules including sales automation, marketing automation, customer support, and a CRM portal. Three years later in 2009, they added knowledge management and mobile CRM.

Automate and optimize – a quantum leap

Diefendorf explained that when he implemented Soffront CRM, he started to see a whole new way of doing business that he couldn't see previously. "Soffront is the central nervous system of the business. It forced us to examine all of our processes and workflows, significantly enhancing how we were getting things done. Once we got a better handle on all of the information we were dealing with, we were able to see ways to save time and become more productive in every area of our business. We witnessed a quantum leap in our efficiency."

Using Soffront, DCPA is able to automate and optimize its processes, dramatically increasing productivity. "With Soffront we are now able to manage the workflows for each activity, such as investment trades, receipt of checks, sales orders and service work," explained Diefendorf. "We can then distribute these activities throughout the global organization in real time."

Soffront improves workflow by "pushing" information out, rather than requiring DCPA to "pull" the information out. "The concept of 'push' versus 'pull' is vital in optimizing our workflow," continued Diefendorf.

Robust features

According to Diefendorf, several features of Soffront CRM have helped him transform the way DCPA does business. "Soffront's reporting capabilities and notification rules not only provide us with concise information, the software automatically ranks it, notifies the appropriate persons involved, and escalates the information as needed," explained Diefendorf. "The dashboard provides us with a 360 degree view that puts all of the tools at our fingertips."

Soffront's web access allows DCPA to access their suite of software applications worldwide. "Using Soffront we have implemented "Office

Anywhere”, allowing us to improve efficiency and increase productivity,” Diefendorf related. “No matter where we are located physically, we have full access to our systems from anywhere in the world.”

Vendor portals allow DCPA’s vendors limited access to their system, increasing transparency and productivity. “Our vendors actually become our strategic partners, helping us escalate processes without increasing size of our organization. By using the vendor portal to its full potential, we are more efficient and can do more without increasing staff. In addition to “Vendor Portals,” we have added “Strategic Alliance Portals,” as well as, “Virtual Work Partner Portals.” These unique Soffront tools have revolutionized the way we do business.”

CRM on steroids

With Soffront, DCPA has created a whole new way of doing business using what Diefendorf describes as CRM on steroids. “Using Soffront, we have created an application that improves our efficiency and productivity. We can now do more without increasing staff,” concluded Diefendorf. “In the last three years, we have increased our revenue by 300%; Soffront is one of the key reasons for this growth.”

About Soffront

Soffront Software Inc. has experience, technology and focus for mid market companies seeking CRM solutions. A pioneer of CRM since 1992, Soffront offers end-to-end, fully integrated CRM solutions spanning sales, marketing, customer service and employee help desk. With more than 500 CRM customers worldwide, Soffront’s installed base includes Fortune 500 companies, mid-sized businesses, federal, state, and local governments. Soffront is privately held, debt-free, and profitable.

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