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— Tania Bonchonsky, Administrative Associate, Performance Branding Services

Performance Branding Services uses WebEx WebOffice to manage customer relationships



INDUSTRY

Consulting

SUMMARY

Performance Branding Services — a Torrance, CA-based business consultancy and distribution firm for professional salons, spas, medical practices, specialty boutiques, hotels and resorts — uses WebEx WebOffice as an integral tool in its operations.

ABOUT

PERFORMANCE BRANDING SERVICES

Line of Business

Consulting

Headquarters

Torrance, CA

Number of Employees

6

WebEx WebOffice User Since 2003

Customer Business Profile

Performance Branding Services provides a wide range of services for salons, spas, medical practices, specialty boutiques, hotels and resorts — including: consulting on salon performance, private label branding and product launching. The firm also distributes a complete range of personal care products.

The Situation

As a six-person company with offices in multiple locations on the West Coast, Performance Branding Services needed a better way to track customer follow-up and coordinate the efforts of its dispersed sales team.

“We have to stay on top of what each customer needs. Before WebOffice, we’d be on the phone all the time trying to keep track of who’s doing what,” says Tania Bonchonsky, Administrative Associate, Performance Branding Services.

The Solution

Performance Branding Services adopted WebEx WebOffice as its online customer knowledge base — to keep track of interactions with each of its clients.

“Whenever a salesperson speaks with a client, or has any contact with them at all, we’re able to track that with WebOffice and keep an activity log. This way, everyone on our sales team can always

see the most updated information on a particular customer,” says Bonchonsky.

The Benefits

Performance Branding Services sales force saves time and increases efficiency by using the WebEx WebOffice Database Manager for Customer Relationship Management.

WebEx WebOffice allows the Performance Branding Services sales team to readily access the most up-to-date information on the status of each of its customer accounts — in terms of sales/customer contact, communication and distribution of products. WebOffice greatly facilitates follow-up with customers.

“I especially like the way we are able to organize our WebOffice database — tailoring the database template by creating categories that are relevant to the industry we’re in and eliminating categories that don’t really pertain to us. That’s been wonderful. It makes what we’re doing more precise. Besides the standard customer contact information, we can track whether or not we’re sending product samples, track follow-up sales calls, etc. It’s all very easy to organize and manipulate.”

Because of WebOffice, less time can be spent internally coordinating efforts and more time can be used for contacting more customers. Because information

is so readily accessible, the WebOffice database also allows the firm's sales people to be very well-informed about each customer's needs.

"The WebOffice Documents Manager is also fantastic," Bonchonsky says.

"This is how we keep our documents updated and organized by sub-categories for our sales people in the field. I'm able to input documents into the Document Manager directly. There's no cutting and pasting. It moves very smoothly and quickly. I'm not waiting a long time to upload a document. I'm very pleased with that."

"Performance Branding Services works in partnership with our clients to ensure their success, and we use WebOffice, primarily internally, to help ensure our own success."

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HIGHLIGHTS

- Performance Branding Services uses the WebEx WebOffice Database Manager for Customer Relationship Management — saving time and facilitating sales follow-up with customers.
- The WebEx WebOffice Database Manager Activity Log allows Performance Branding Services sales people to stay well-informed about each customer's account activities.
- Performance Branding Services uses the WebEx WebOffice Document Manager to keep its sales force updated with the most current sales materials and company documents.

