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The Phelon Group Uses WebEx WebOffice To Support Growth



INDUSTRY Consulting

SUMMARY

The Phelon Group, an international strategy consultancy with enterprise clients, such as Adobe, EMC, EDS, and HP, credits WebEx WebOffice with supporting its growth. The firm uses WebEx WebOffice as a knowledge base, a communications vehicle for its expanding team, and an integrated platform for sharing information with clients and strategic partners.

ABOUT THE PHELON GROUP

Line of Business

Marketing Consultancy

Headquarters

Sunnyvale, CA

WebEx WebOffice User Since 2004

Customer Business Profile

The Phelon Group is an international strategy and implementation consultancy with clients worldwide and a key presence in California, Boston and New York.

Since its founding in 2002, The Phelon Group has conducted Customer Leverage initiatives for enterprise solution providers, such as Intel, Adobe, HP, Oracle, and EMC. “We help clients evolve customer reference activities from tactical programs with limited impact to strategic customer relationships that represent a major corporate asset in the drive for growth,” says Promise Phelon, Founding Partner.

The Situation

“When we started the Phelon Group, we needed a solution that would allow us to manage our most valued internal asset — the knowledge and experiences of our team,” says Phelon.

The Solution

“We found that solution in WebEx WebOffice,” says Phelon.

The Phelon Group uses WebEx Meetings to interact with clients, the Document Manager as a central knowledge repository, the Database Manager for customer relationship management and sales forecasting, and the Discussion Forums for collaboration among colleagues.

The Benefits

“We differentiate our firm on results which

rest heavily on the quality of our content, how we deliver, the level of expertise of our teams, and the strength of our client relationships. WebEx WebOffice definitely supports us in all these ways, and it does so within our budget,” says Phelon.

WebEx Meetings provides an affordable way to interact with clients worldwide. “We like to communicate in a way that’s interactive – to walk clients through a presentation and get real-time feedback. WebEx Meetings allows us to ‘sit’ next to our clients and have conversations, not monologues. That makes a big difference!”

The WebOffice Discussion Forums help Phelon Group professionals efficiently share their collective expertise. “When you buy from a firm like ours, you are buying our collective knowledge. If someone is working on a project at a client location and has an issue, they can set up a Discussion Forum and say, ‘I’ve got this issue. How can I address it? Have you seen it before?’ WebEx WebOffice is a good tool for collaboration. It keeps everyone current, and that is a huge benefit,” Phelon says.

“We frequently use the Document Manager at client sites to instantly retrieve documents. If the client says ‘I never saw that document,’ or ‘I don’t know what you are talking about,’ we don’t want to say ‘When I get back to my office in two days, I’ll send it to you.’ We want the document right away.”

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“WebEx WebOffice allows us to be less tied to a desk. Regardless of where I am, I can log into WebOffice and give a client something. We rely heavily on the system,” Phelon says. “And, I like the fact that WebOffice has integrated Google into its search function, because it simplifies finding things.”

The Phelon Group uses the WebOffice Database Manager for customer relationship management. “We’re able to be more proactive. Also, using WebOffice as a sales forecasting system is really powerful for us,” Phelon says.

In addition, the firm uses the Database Manager as an idea saver. “When team members have good ideas about how to

get more clients or better serve the ones we have, they log those into the Database Manager, rather than those ideas getting lost in someone’s email box.”

“Our team uses WebOffice as our home page. When I wake up in the morning, it’s the first thing I see,” Phelon says. “When we win a new deal, or if there’s an interesting competitive move, we post a notice in WebOffice Announcements on the home page.”

“We appreciate everything WebEx WebOffice has to offer. WebEx does a good job of touching base with its customers to learn how to best serve them and that’s very important,” Phelon concluded.

HIGHLIGHTS

- The Phelon Group uses WebEx Meetings to centrally manage and orchestrate meetings – for internal teams, for marketing activities and to communicate with clients.
- The Phelon Group uses the WebEx WebOffice Database Manager to proactively manage customer relationships and for sales forecasting.
- The Phelon Group uses the WebOffice Discussion Forums and the Document Manager to share their collective knowledge and expertise.

