

“One of WebEx WebOffice’s greatest assets is its ability to track and manage the progress of THOUSANDS of sales leads. We input new leads into our WebEx WebOffice databases daily and can distribute the information to our staff instantly. This is unique to WebEx WebOffice and has eliminated our use of other database applications.”

— Isaac Voss, CEO, World Family Financial

World Family Financial uses WebEx WebOffice to manage sales leads and grow its business



INDUSTRY

Financial Services

SUMMARY

World Family Financial, a growing financial services firm with more than 120 agents nationwide, is using WebEx WebOffice for Customer Relationship Management (CRM). The firm attributes much of its rapid growth to being able to attract new agents because of their desire to work with its first class CRM system. WebEx WebOffice also provides World Family Financial a central hub for announcements, calendaring, and task management.

ABOUT WORLD FAMILY FINANCIAL

Line of Business

Financial Services

Headquarters

Keizer, OR

Number of Employees

122

WebEx WebOffice User Since 2004

Customer Business Profile

World Family Financial is a growing financial services firm in Keizer, OR, with more than 120 agents nationwide.

The Situation

When World Family Financial began operations, its founders needed a cost-effective way to manage sales leads, to schedule the activities of a dispersed sales force, and to keep sales reps up-to-date with the latest company data and mortgage rate information.

The firm initially used ACT!® to manage and track sales leads and Microsoft Outlook® for its scheduling needs. Data and mortgage rate information were circulated manually and by e-mail.

Management soon realized it needed a better way to manage sales leads, coordinate schedules and speed the delivery of large volumes of financial data to their sales team, if the firm was going to be successful.

“We considered building our own corporate intranet,” says World Family Financial 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.”

The Solution

World Family Financial chose WebEx WebOffice to facilitate scheduling,

increase employee collaboration and track thousands of sales leads nationwide.

WebEx WebOffice provides the technology the firm was looking for without the costs and maintenance hassles of an in-house, custom-built solution.

The Benefits

“WebOffice lets us track the status of client transactions every step of the way, so we can make sure there are no bottlenecks in our pipeline. Giving better service to customers means more profitability for the company,” explains Daniel Friess, Chief Operating Officer, World Family Financial.

He attributes much of the firm’s rapid growth to being able to attract new agents because of their desire to work with its first class WebOffice CRM system. “We’ve grown from a half dozen to 120 agents in the past year and a half.”

50% of the firm’s 120 associates are out of its home market place in other states and regions, and WebOffice has proved very useful in connecting these sales reps to headquarters.

Voss says, “We use WebOffice 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 WebEx WebOffice's ability to let his team work on documents, presentations, and reports, regardless of where they are geographically. They simply log on to the WebOffice, find the information they need and make the necessary changes or updates, and upload it back to the site. Then everyone has access to the most current version of company documents.

"WebEx WebOffice has become an essential part of our core business.

In fact, it is the "homepage" for every employee," Voss said. The sales team easily stays in touch with the home office, keeping up on all of the latest news and company information.

Voss was especially impressed with the overall simplicity of setting up WebEx WebOffice and its cost-effectiveness. "WebEx WebOffice had us up and running in minutes, providing a valuable service at a reasonable monthly fee and offering flexible terms," said Voss.

Overall, WebEx WebOffice offers a set of 'best-in-class' collaboration tools that have become vital to our organization's success.

— Isaac Voss,
CEO, World Family Financial

HIGHLIGHTS

- WebEx WebOffice's CRM allows World Family Financial to track the status of client transactions every step of the way and make sure there are no bottlenecks in its sales pipeline. Giving better service to customers means more profitability for the company.
- World Family Financial uses WebEx WebOffice daily to manage group schedules, assign tasks, post important documents and share mortgage rates with its staff.
- WebEx WebOffice lets World Family Financial manage thousands of sales leads efficiently and contact qualified potential customers as soon as possible — giving the firm a competitive edge.
- Because agents want to work with a first-class CRM system, such as WebEx WebOffice, World Family Financial has been able to attract and recruit agents nationwide. The company has grown from a half dozen to 120 agents in the past year and a half.

