



Agiloft Partner Success Story

Business Overview

With offices in northern and southern California, Lexnet's CRM specialists help west coast companies choose and implement business process automation solutions. In the past decade, they have completed hundreds of successful implementations for a wide range of industries. In addition to delivering on-time, on-budget solutions, Lexnet prides itself on the measurable improvement of its clients' productivity.

Challenges

In today's competitive CRM marketplace, customers can afford to be choosy. A reseller's success hinges on its ability to offer a cost-effective solution that fully meets the customer's specific needs. The ideal CRM product should:

Adapt to changing business needs: It is no longer reasonable to expect clients to define their requirements, take more than six months to implement their system, or expect their needs not to change during that time. The product must be quick to implement the current business needs and adjust to the new needs that will arise tomorrow.

Be flexible enough to map clients' preferred processes: Most CRM products are customizable to some extent, but many have limits to the number of tables, fields, and kinds of relationships that can be added. The ideal product should readily adapt to the way a company does business, and should not require changing business processes to match the product.

"In three months, we created four custom applications and gained six major new accounts. I have never seen anything like it. This is the holy grail of a code-free development environment."

**- Steve Chipman,
President**

Support appropriate licensing options: Many clients want a hosted CRM solution, while others prefer a dedicated server that the provider manages. Still others have security standards that require the data to be held inside their firewall and will only consider an in-house solution.



Industry

- CRM/BPA Consulting Group

Challenges

- Satisfy the ever-changing needs of rapidly growing Web 2.0 clients
- Provide customizability and flexibility to map any business process
- Satisfy demands for both SaaS and in-house solutions
- Support clients' preferred server platforms
- Provide an easy-to-maintain system that reduces ongoing costs
- Offer a fully scalable solution with excellent performance

Agiloft Solution

- Extremely adaptable, extends to meet new customer needs
- Multi-platform compatibility
- Flexible licensing and sales models
- 100% Web-based, J2EE, scalable, feature-rich product

Benefits

- Browser-based customization reduces implementation time
- Ability to map any business process
- Extends easily to meet new customer needs
- Complete life-cycle visibility for all records for full auditability

Lexnet and Agiloft

Support the client's preferred OS platform: Many companies have a preferred platform, whether it's Microsoft, Solaris, or Linux. The CRM solution should be available on the customer's preferred platform.

Minimize IT involvement: A product that business managers can customize and maintain without waiting for IT is easier to sell and reduces ongoing costs.

Provide a scalable architecture: Clients today want web-based architecture with cross-browser compatibility and desktop-quality speed and performance.

The Agiloft Solution

Platform Independence: Agiloft's 100% web-based J2EE CRM/BPA solution runs on Linux, Windows, Solaris, and AIX. It ships with a MySQL database but can also be used with a MS SQL database. Clients can easily move from one platform to another by doing a simple export and import of the whole KB in less than an hour.

"For the past ten years, my company has sold, reviewed and implemented just about every product on the market. Agiloft offers many times the level and speed of customization of any other product that any of us have worked with."

- Steve Chipman

Multiple Licensing Options: Customers can choose the Agiloft hosted service on either a shared or dedicated server. They have the freedom to move it at any time, intact, to their own in-house servers. "We have found that it is a lot easier to make a sale to a hesitant client when you can offer them a low-

risk, inexpensive hosted service until the system has gone live and proven its value, with the option to move everything in-house at any time," says Steve Chipman, President of Lexnet Consulting Group.

I spent less than half a day designing serialized Equipment and contract tracking functionality in an Agiloft trial database, along with all the inter-relationships among various tables — and I'm not a programmer."

— Steve Chipman

Fully Adaptable and Extensible: Administrators can add an unlimited number of custom fields, tables, and relationships, and its powerful workflow and rules engine can map the most complex business processes. "While some business needs are known up front, it has been my experience that new requirements almost always come up after an implementation has begun. With Agiloft, I don't have to tell clients that what they want isn't possible. It's an amazingly configurable system that dramatically reduces the load on internal IT departments," says Chipman.

Lexnet Customer Success Stories

Software Company Support System: One Lexnet client, a medium-sized software company, was using "plain old email" to manage external support issues, which "was just a mess," said Chipman. There was no way to track issues, allow customers to self-serve, or escalate issues automatically to a higher tier of support. Because ticket data was embedded into individual emails, no reports were available to provide information on how many issues were arising, which were most common ones, and how effectively technicians were closing them.

Lexnet Case Study

Agiloft was ideally suited to clean up their process. Its ability to handle inbound emails to different addresses, integrated knowledgebase, and powerful escalation rules allowed technicians to track issues more effectively. Customers could submit issues 24/7 and self-serve through the FAQ interface. Daily and weekly reports generated from the system show the number of tickets closed by each technician, as well as which types of issues are most prevalent.

Building Contractor Project and Contact

Management: Another client, a building contractor, uses Agiloft to manage its projects. “One of the nice things about Agiloft is the ability to adjust built-in features for particular users of the system,” says Chipman. For this implementation, several custom fields were added to track things like the architect and job site. Because Agiloft’s calendar function is extensible, Lexnet was able to modify it to display custom fields, and add a button that opens up a map in Mapquest with the job location. All of these features make the estimator’s job much easier. “All the information that estimators need to access is right at their fingertips within the calendar entry,” said Chipman.

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— Steve Chipman

About Agiloft, Inc.

Over 2.5 million users at organizations ranging from small enterprises to U.S Government agencies and Fortune 100 companies depend on Agiloft’s top rated product suites for [Contract Management](#), [Service Desk](#), [Custom Workflow](#), and more. Agiloft specializes in automating processes that are too complex for competing vendors. Our best practice templates and agile technology ensure rapid deployment and a fully extensible system. For more information, visit <https://www.agiloft.com>.

