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Case Study

Complex data import nets Tee-Zel a looking glass into their target market.

When Tee-Zel approached Island Computer Services' Joe Morlino regarding a sales automation strategy, GoldMine seemed like a perfect fit. When it came time to import the data, however, it was quickly apparent that a little more than GoldMine's data import wizard would be required to get the job done.

After a lot of Q&A and a little custom SQL programming, Tee-Zel has the best seat in the house for viewing their market penetration and prospect conversion data. Sales Personnel now spend their time calling high-probability prospects instead of wasting valuable time on the phone, just to find out they're chasing their tails.

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The Back-story:

Tee-Zel, a manufacturer of golf-related novelty snacks, targets Golf Courses throughout the United States and Canada via direct marketing reps working in-house. For prospecting lists, Tee-Zel relies on the National Golf Foundation (NGF), who provides an accurate, rich database of Golf Courses and their associated management companies. During the Requirements Definition meeting it was discovered that Tee-Zel gauges sales success based on market penetration. It's also understood that calls to Golf Courses who are independent (not managed by a management company) or who are managed by management companies who have a small number of courses in their portfolio are much more receptive to changes in snack food purchases and are covered well by inside sales reps. Larger management companies (and their associated Golf Courses) are better served through an outside sales program. The good news for Tee-Zel is that the NGF Data included all this information but in a multi-file relational database format. The bad news was that the data is not readily imported into GoldMine by GoldMine's native Import tools. Also complicating the problem was that, not only did the raw data need to be imported, but the relationship between the management companies and the Golf Courses needed to be maintained so that accurate market penetration figures could be calculated as Golf Courses were converted from prospects to customers. Finally, the Golf Courses needed to be "tagged" as either independent, belonging to a small management company or belonging to a large management company. Clearly something beyond GoldMine's Import Wizard was required.

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The Solution:

It was clear to everyone that the best way to retain the relationship information pertaining to management companies and Golf Courses was to use GoldMine's referrals tab. This would allow sales reps the ability to quickly see if a Golf Course was "managed" and/or how many Golf

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Courses a management company was managing. GoldMine's referral tab seemed perfect for on-the-fly information gathering.

By leveraging the capabilities of Microsoft's SQL Server database platform and GoldMine's Stored Procedures API, Relatia's programmers were able to import all the NGF data, and then establish relationships between the Management Company Records and the Golf Courses.

In order to get accurate market penetration numbers, Tee-Zel management personnel needed a way to quickly see how many Golf Courses were converted to customers.

Relatia's Programmers were able to create a SQL Job that ensured Golf Courses were categorized as "Independent" (Independently Managed) , "5 or less" (Managed by a management company who also managed five or less additional Golf Courses), and "6 or more" (Managed by a management company who also managed 6 or more additional Golf Courses) using a custom field so that reports could be run against the data showing market penetration within the various management categories.

The Geek Speak:

Data Import was handled by first using GoldMine's native import tools to import the golf courses and management companies in multiple data import runs including the unique ID's which were used to connect the two entities in the NGF database. The unique ID's were stored in a custom field hidden from view in the user interface.

A custom-written SQL script was run on the data after it was imported to create referrals between the golf courses and management companies, then update the sync logs so that data synchronization capabilities were not forfeited.

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Once the script had been run, and the referral information was verified against the original data, a SQL job was deployed to run on a daily basis that classified each golf course according to how many referral records existed for the management company it was referred to. The SQL Job updated a contact2 field so that reports and filters could be created on-the-fly by the end-users without having to know how to write SQL queries.

The Win-Win:

By utilizing the tools already in place, Relatia's programmers were able to replicate the industry's best data source in GoldMine's powerful CRM interface. Tee-Zel sales reps were able to see high-quality prospecting information, which allowed them to focus on calling higher-probability prospects and stop wasting time calling golf courses who were least likely to make a decision in-house.

For more information on custom development, contact Linda O'Connor at 770.663.4455 ext 305.

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