

SUCCESS STORY

Bank of America



COMPANY

Bank of America is one of the world's largest financial institutions, serving individual consumers, small businesses and large corporations with a full range of banking, investing, asset management and other financial and risk-management products and services. More than 10,000 businesses and 20,000 individuals internationally -- employees of Fortune 500 companies, entrepreneurial organizations, nonprofits and municipalities - depend on Bank of America for benefits and brokerage services.

INDUSTRY

Financial Services

QUICKBASE SOLUTIONS

Sales Management

WHO'S USING QUICKBASE

Teresa McGuire, Business Systems Analyst, manages the software that helps the Bank's Insurance Services division's 100-person sales team work together. Not long ago, increasing business meant she needed a fresh solution to keep her sales team up-to-date on all prospects, sales leads and referrals.

Intuit QuickBase

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Teresa's Challenge

- Update information across a growing sales team
- Create a central source for sharing information
- Reduce manual data-entry logjams

It was a tall order. Previously, Teresa, Business Systems Analyst, had developed a central database to track leads, referrals and contract status. 100 sales reps sent Teresa their separate weekly reports via Excel spreadsheets. Combining these spreadsheets into one comprehensive database was a necessary but increasingly time-consuming task, taking up to 25 hours a week and requiring ever more of Teresa's time and oversight.

She needed a new solution for her growing team, one that would allow real-time sharing and access for every sales rep and manager. After reviewing several products, she turned to QuickBase® for Corporate Workgroups.

The Solution

- Central shared information source for the team
- Secure access from any location
- Easy to use, customizable reporting tools

With QuickBase for Corporate Workgroups, sales reps can update their own information instead of submitting spreadsheets. Many different people can administer the database, and Teresa can delegate much of the administration to her assistant. Now Teresa can analyze the accumulated data at top speed and then create insightful reports.

Besides the time and money saved, QuickBase's accessibility, custom databases and easy workgroup administration all confirmed that this was the right solution for Teresa's sales team. The team now is better informed, up-to-date, and coordinated on the status of any account. Since it's a secure Web-based service, team members can access QuickBase from any Internet connection anywhere, and be up and running in minutes.

"I am a busy person," Teresa tells us. "With QuickBase, my sales team can make their updates anytime, from any location, saving me the trouble of manually entering data. This alone significantly reduces the inaccuracies that resulted from our old system, where too many hands were entering and adjusting critical sales information."

The Results

- Time and cost savings
- Improved communication across sales team
- Faster analysis of sales performance

With QuickBase for Corporate Workgroups, Fleet Insurance Services found a low-cost, easy-to-use, and accessible business solution that really helps its sales team keep accurate records and stay up-to-date on all its accounts. This improved efficiency has resulted in significant time savings, and ultimately, cost savings for the sales group.

Database maintenance, which once took Teresa up to 25 hours a week, now only takes her 3-4 hours — reducing her administrative workload by a remarkable 80 percent. Her entire team operates more efficiently from having round-the-clock, real-time access to a central source of account information. And Teresa smiles just a little more than she used to.

"QuickBase is a great solution for anyone that doesn't have a common network," she says now. "It's the best way to share information. Also, the Intuit name and reputation confirm the commitment to quality and customers."