

APPLIED EDUCATIONAL SYSTEMS

“Our goal is to prepare today’s students for tomorrow’s world.”



CORPORATE PROFILE: AES provides Educational Systems to fulfill the total needs of today’s students. By assimilating the needs and wants of the educational community, it has created innovative, state-of-the-art learning systems.

Comprehensive programs address the many challenges encountered by educators and empower students with the latest instructional strategies. AES utilizes integrated systems which combine software, hardware and outstanding curriculum materials.

BUSINESS NEED AND GOLDMINE® SOLUTION: While AES sells almost exclusively to public schools, it does not directly market its educational programs to the end-users themselves, but works through Independent Sales Representatives. Working through about 75 Independent Reps throughout the country, AES wanted its superior curricula to stand out amongst the four or five other companies that were also being represented by the Independent Reps during sales opportunities.

“We were using *ACT!*,” recalls Jim Schultz, President of AES, “and were at a really basic level. We needed a Contact Manager that was going to allow us to share information, and maintain more stability in the network.” After proactively researching several management solutions like *Maximizer* and other CRM tools, AES chose GoldMine® for the company’s Customer Relationship Management needs. “There was a lot there,” says Schultz. “GoldMine® had a stronger overall package than *ACT!* and a better Opportunity/Project Manager, and we wanted to go for the tool that had lots of features and the ability to be customized.”

Continually upgrading its GoldMine® software, AES currently uses GoldMine® Sales & Marketing™ to manage its database of over 3,500 customer contacts. With

“The main focus at AES is to provide educational systems to address curriculum needs K-12.”

Company:
Applied Educational Systems, Inc.

Contact:
Jim Schultz,
President

Website:
www.aeseducation.com

Product:
GoldMine® Sales and Marketing™

Solutions Partner:
CSH Consulting, Inc.



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approximately 35 employees, 15 network users and 5 remote sites all using GoldMine® to share information throughout Pennsylvania, New Jersey, Virginia and even Arizona, the efficiency of the synchronization process provided by GoldSync™ has been an integral part of the way AES conducts its business. By 'syncing' about three times per week using lap-tops, palm-pilots and office computers, AES is able to keep its information up to date across departments within the company and with its field representatives. "We actually have a lot of good information," says Schultz, "and we provide that information as a service to our Sales Representatives. This way, the Sales Rep can say, 'We spoke six times last week, here are the dates, etc.' and it makes both the Sales Rep and us look very organized."

AES also uses many of the other advanced capabilities offered by GoldMine® Sales and Marketing™ including the Mail Center, as well as the more advanced features such as the Opportunity/Project Manager and the Automated Processes™. "The Automated Processes™ have not only allowed us to save time, but also to become more focused and efficient," Schultz explains. "It's a combination of GoldMine® and FaxRush® [a Third Party product]. For example, when someone registers for a training class and the registration process starts, the Automated Process generates a confirmation letter, the travel information, a follow-up letter, and so on. Now, instead of hiring a part time person to sit there and do all this, we just have an on-staff person do it in an hour." Further facilitating its faxing capabilities through FaxRush®, AES is able to immediately send Tech Support information to customers using GoldMine®'s scheduling process. In addition to the effectiveness of the Automated Processes™, Schultz also notes the significance of GoldMine®'s Mail Center features wherein Mass Mailings can become easily personalized and sent to individuals based on specific Contact information.

"Another big thing that we've done is utilized the Opportunity/Project Manager. Each time a salesperson identifies an opportunity, we enter the information into the GoldMine® Opportunity Manager. We've customized the probability factor based on our experience, we calculate the forecasted sales, and that all gets printed

"With GoldMine®, we can track every incoming call, every e-mail, what happened on a sales call... all in the 'History Tab,' which is important so everyone at AES – sales, manufacturing, customer service, etc. – can see and share the same information. Just a simple thing like that has really helped our company."



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out into a report. Later, we can use these reports to compare forecasted sales to actual sales, and make adjustments.”

“As far as the GoldMine® Solutions Partner,” Jim says, “I think it’s the experience and technical expertise that makes having one so important.” With the assistance and guidance of CSH Consulting, Inc., AES was brought to the next level of Customer Relationship Management. “It’s adding to what you already have. CSH understands what we want to do and finds how GoldMine® can help us become more effective.” Working together, CSH has helped AES convert data, upgrade its systems, inform AES of new features and capabilities within GoldMine® and provide training for its staff.

“A good Solutions Partner and the support they can provide is one of the most important things. They grow with you to incorporate GoldMine® to make your organization more organized, disciplined and efficient.”

“Some of our Independent Salespeople want to install it themselves, and I tell them, ‘you can do it yourself and you could possibly use it to some extent, but you’re really not going to see all the benefits like you would if you had a Solutions Partner guiding you through the steps’.”



