

CUSTOMER SUCCESS STORY

Coakley Brothers

Easier is Better for Coakley Brothers and OnContact CRM

Coakley Brothers

- Improved ease-of-use for users, managers, and administrators
- Usable without needing to be tech-savvy
- Ability to track entire sales process
- Much stronger database of contact information

A CRM is only helpful when it's designed for ease-of-use with sales reps and administrators in mind. In our most recent customer testimonial, we sat down with Coakley Brothers Vice President Mary Edwards and Director of Sales Development Mark Klenz. Coakley Brothers is a premier moving services company, serving the Milwaukee and Madison areas for over 125 years. In addition to residential and commercial moving services, they're also a furniture installation and configuration enterprise. They also sell new furniture and provide light construction and design services.

Serving two major customer bases in both Milwaukee and Madison, Coakley Brothers has relied on customer relationship management (CRM) software for help with sales automation and reporting. In order for sales reps to use CRM software, it needs to be easy to use. Coakley Brothers was never able to find an easy-to-use solution until they discovered OnContact CRM Software by WorkWise.

In Coakley Brothers' decision to make the switch to OnContact, Mary emphasized the usability of the product as compared to their previous CRM Solution.

"We have nothing but good things to say about this new system. Our last CRM solution was not easy or intuitive to use. It was a system where you really had to be technologically savvy, which I'm not. There was no flow. With OnContact CRM, I know I can quickly go in there and enter my activities with ease. That's what our sales reps needed—something that's easy to use."



Coakleybrothers

For Coakley Brothers' sales reps, some of their favorite benefits of OnContact include the ability to track the sales process from start to finish, as well as the ability to pinpoint specific opportunities within the CRM to tackle.

"Our sales people don't have territories, so OnContact really helps us avoid cross-selling. It also lets us track the sales process: where prospects are at within the sales cycle, highlights certain opportunities to tackle. In addition, it helps us keep a much stronger database of information regarding our contacts and their companies."

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OnContact CRM doesn't just provide benefits for its users—it's also incredibly easy to use from a management and administrative perspective.

"It's easy to change a lot of the administration duties, something that was harder to do in our previous CRM solution. From a management and administrative perspective, the system is very simple to maneuver."



Coakley Brothers' experience with OnContact customer service and support? Excellent.

"Our experience with OnContact's customer service and support team has been excellent. They really try to understand our needs and make changes that are appropriate for what we're requesting."

If you're in the market for a new CRM solution, don't be surprised if you hear first-hand rave reviews from Mary or Mark of Coakley Brothers.

"We actually just talked to someone yesterday who was asking about OnContact. We said yes, of course we recommend it. You guys did a great job of understanding what our needs were, implemented those in a timely fashion, and then have done a great job with follow-through to make sure we know how to utilize the system to the best of our ability."

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workwisesoftware.com



800-490-9010

N80 W12878 Fond du Lac Ave. Menomonee Falls, WI 53051