

## EnterpriseWizard Partner Success Story



“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, Lexnet Consulting Group

### 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, wait 6 months for them to be implemented, and expect their needs not to have changed in 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 some 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.

#### Support appropriate licensing options

Many clients want a hosted CRM solution, while others prefer a dedicated server that is managed by the provider. Still others have security standards that require the data to be held inside their firewall and will only

### Industry

CRM/BPA Consulting Group

### Challenges

Satisfy the ever-changing needs of rapidly growing Web 2.0 clients

Provide depth of customizability and the 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

### EnterpriseWizard Solution

Extremely adaptable, extends to meet new customer needs

Multi-platform compatibility

Flexible licensing and sales models – SaaS, in-house lease, or outright purchase

100% Web-based, J2EE, scalable, feature-rich product

### Solution Benefits

Browser-based customization reduces implementation time

Extreme flexibility makes it able to map almost any business process

Extends easily to meet new customer needs, resulting in expanding usage and increased license sales

Complete life-cycle visibility for all records for full auditability

### 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 EnterpriseWizard Solution

### Platform Independence

EnterpriseWizard's 100% Web-based J2EE CRM/BPA solution runs on Linux, Windows, Solaris, and AIX. It ships with a MySQL database but may 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.

### Multiple Licensing Options

Customers can choose the high-end EnterpriseWizard hosted service on either a shared or dedicated server, and they also have the freedom to move it, 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 purchase and move everything in-house at any time," says Steve Chipman, President of Lexnet Consulting Group.

### 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 EnterpriseWizard, 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 Steve Chipman.

**"For the past ten years, my company has sold, reviewed and implemented just about every product on the market. EnterpriseWizard offers many times the level and speed of customization of any other product that any of us have worked with. I spent less than half a day designing serialized Equipment and contract tracking functionality in an EnterpriseWizard trial database, along with all the interrelationships among various tables -- and I'm not a programmer."**

— Steve Chipman  
President  
Lexnet Consulting Group

## 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 in individual emails, no reports were available to provide information on how many issues were arising, what the most common ones were, and how effectively technicians were closing them.

EnterpriseWizard was ideally suited to clean up their process. Its ability to handle inbound emails to different addresses, its integrated knowledge-base, and powerful escalation rules allowed technicians to track issues more effectively, and for customers to 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 statistics and trend graphs on which types of issues are most prevalent.

### Building Contractor Project and Contact Management

Another client, a building contractor, uses EnterpriseWizard to manage its projects. "One of the nice things about EnterpriseWizard 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 EnterpriseWizard's Calendar function is extensible, Lexnet was able to modify it to display these custom fields, and to add a button that opens up a map in Mapquest with the job location, which made 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.

**"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 purchase and move everything in-house at any time,"**

— Steve Chipman  
President  
Lexnet Consulting Group

### For More Information

Contact EnterpriseWizard at  
888-727-2209 ext 1  
or Lexnet Consulting Group at  
800-799-4539

## About EnterpriseWizard

EnterpriseWizard, Inc. ([www.EnterpriseWizard.com](http://www.EnterpriseWizard.com)) is the leading provider of powerful, easy-to-deploy, and cost-effective Web-based software solutions for business process automation, customer support, and change management for organizations with complex products or services. Its flagship product, EnterpriseWizard, and its adaptable SaaS Wizard platform have attracted hundreds of customers, ranging from startups to leading edge companies such as Chevron, NEC and Fujitsu.

## Corporate Headquarters

EnterpriseWizard, Inc.  
654 Bair Island Rd, Suite 300  
Redwood City, CA 94063  
United States of America

