



*“I need everything it offers and it works very well for me.”*

– DocClarity



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Contact Management • CRM • Sales Automation • Customer Support - Help Desk • Project Management • ERP Integration • Time - Invoice Billing

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### **Business Problem: Customer Support**

The company quickly needed to find customizable Sales Force Automation and CRM tools. After trying out EBSuite’s online tutorials and receiving an immediate follow up call from customer support, the DocClarity decided that using this ASP was the only way to go.

### **Alternatives Explored:**

Microsoft Project

### **Reasons for Selecting EBSuite:**

- Extended free trial use
- Incredibly customizable
- Cost effective
- Web Based solution
- Fast system response time
- Real-time management of tickets and tracking of ownership
- Ability to customize to client needs

### **Organization Size:**

Start-up, 3 employees, each in different time zone

### **Solutions Purchased:**

EBSuite’s web based Sales Force Automation - Customer Support solutions.

### **Benefits Experienced:**

- Easy to customize
- Shared data
- Company executives in 3 different time zones have access to shared information and no data synching requirements

### **Customer Comments:**

“What I really, really enjoy is that SFA and CRM are combined because that saves a lot of time for Tom (company president) and myself. When Tom closes a deal, he can just pull them into a client and I can take it from there. There’s no need to make sure your integration is working properly, or to get all of your notes out of the SFA application and put them into the CRM tool.”

“The fact that the two modules are in the same application is very handy for me and for sales. In fact, I’ve recommended EBSuite to two of our clients.”

**Taryn Petersen, VP of Product Services,  
DocClarity**

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