



“  
We were with Siebel, until they could not  
support our Apple Macintosh users,  
SalesForce.com was incomplete  
”  
– Etoic Mail



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

### **Business Problem: Sales Automation**

LOGI, Inc. is a financial services firm based in New York and a leader in institutional investment products. LOGI builds relationships through individual communication to assure long term relationships. LOGI's business has grown rapidly and managing relationships are key to our future growth.

The challenge: With offices in three regions of the US, track communications with prospective customers, set up follow-up schedules and execute sales.

Solution: EBSuite's easy to use Sales Force Automation solution to track the entire communication cycle, from prospect to satisfied customer. We use even upload pictures of our clients.

### **Alternatives Investigated:**

UpShot, SalesForce.com, NetSuite

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

#### **EBSuite's selection of benefits:**

- Ease of Use
- Complete Customer Support
- Flexibility to capture complex sales relationships
- Fast system response time
- Web Based solution
- Support for Apple Macintosh operating systems

### **Solutions Purchased:**

EB Suite's Web based Sales Force Automation Solution.

### **Benefits Experienced:**

#### **EBSuite's range of benefits:**

EB Suite's range of benefits:

- Easy to learn, easy to modify
- Macintosh Compatible
- Synchronized information
- Set schedules and execute business
- Up and running rapidly

### **Customer Comments:**

"We were UpShot customers for almost 3 years, until they could not support our Apple Macintosh users. We looked at SalesForce.com but training was incomplete. EBSuite provided excellent customer service and support"