



The Green Company Builds Solid Customer Foundations with GoldMine®

This year alone, more than 7,000 people will walk through the doors of The Green Company — a nationally recognized, award-winning homebuilder based in Newton, MA. Founded by Alan Green over 50 years ago, The Green Company has designed and built 20 of the most distinct and desirable residential communities in New England. Its newest award-winning community, Winslowe’s View At The Pinehills, features homes amid pristine forests and lush golf courses in historic Plymouth, Massachusetts.

With about 80 employees at offices in Newton, Plymouth and Sandwich, MA, the company has approximately 40 points of contact with a customer from initial inquiry through home completion and the warranty period. To ensure seamless client service across the many departments, an employee must be able to access the most current information about clients at any time.

Until 2004, different company divisions were using a variety of CRM solutions and other applications to track client information. Not only was this system inefficient, but it caused duplication of data between divisions, resulting in delays, lost time and difficulty in running reports. “We needed a CRM tool to bring all of our client information together,” said Carolyn Pompeo, sales and marketing associate for The Green Company. “We were looking for one centralized database that everyone in our company could access.”

Constructing a Versatile Solution

The Green Company called upon FrontRange Solutions Partner Harvest Solutions LLC in the fall of 2003. After looking at several CRM options, the company chose GoldMine® Corporate Edition from FrontRange Solutions for its versatility, ease-of-use for multiple users and cost-effectiveness. Plus, The Green Company was confident that Harvest Solutions understood its specific needs and could successfully implement GoldMine within the firm’s diverse departments.

Prior to implementation, a Harvest Solutions consultant met regularly with members of each department, including sales, design, property management and customer care. With clear goals, Harvest Solutions customized GoldMine to include more than 200 user-defined fields for each customer record. That versatility allows the company to track every detail about a customer’s purchase, from pricing to key dates to preferences on flooring, cabinets or bathroom fixtures.

In a key step, the partner also customized GoldMine to create a property record for each home, which is linked to the corresponding customer record – an efficiency-building move the builder had never been able to accomplish before. Prior to the GoldMine installation, all property information was kept in hard files and had to be pulled manually when needed.

“Now we are able to input a great deal of information about both the customer and the home in one CRM system. It has been fabulous for us,” Pompeo said.

With such detailed data, The Green Company creates any one of 35 regular reports with ease. At any time, users can drill down to understand sales trends and analyze dozens of factors to enhance decisions and customer service.

Automating Scheduling and Customer Communications

With GoldMine, the company tracks every customer visit, as well as follow-up calls, letters, e-mails and further appointments with customers. Using GoldMine, representatives from any of the company’s departments can access a customer’s history and property information to ensure a smooth customer experience.

With a centralized database and customized fields, The Green Company’s calendar system automates activities

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Sales, Marketing & Relationship Management



Customer Service



Communication Management



Infrastructure Management



IT Service Management



Master the Dynamics of Change™



for each property transaction. Where scheduling was formerly done manually, the GoldMine system auto-fills dates, thus simplifying the scheduling process and allowing the company to let customers know exactly when each phase of the design-to-build process will take place.

In addition, GoldMine has streamlined the company's reporting system so that reports that normally took hours every week now take minutes. "Now that we have all these user-defined fields in one place, we are able to pull all information from one source," Pompeo said.

Since Harvest Solutions' implementation, the firm has also taken advantage of GoldMine's ability to link documents like contracts to a client record. Now, instead of searching through folders for hard copies or calling between departments, employees can view important documents within the customer record. "Harvest Solutions helped us customize GoldMine to our unique needs, so it's more than a CRM system," Pompeo said. "It's a wealth of information that everyone in our company can access."



About Harvest Solutions LLC

Harvest Solutions, with offices in Massachusetts and New Hampshire, provides customer relationship management, sales force automation and business analytics consulting and training to small- and medium-sized businesses in Massachusetts and southern New England. The company offers a variety of services to increase the effectiveness of CRM systems,

including needs assessment, planning, customization, implementation, data integration, training and support. The company's clients can be found in a range of industries, such as financial services and health care. Harvest Solutions employs a staff of knowledgeable IT professionals with many years of experience in the industry. For more information, call (781) 530-3736 or visit www.harvestsolutions.net.

About FrontRange Solutions

FrontRange Solutions develops award-winning software and solutions used by more than 130,000 companies and over 1.2 million users worldwide to manage a wide variety of business relationships and provide exceptional service. FrontRange product families, designed specifically for small-to-medium-enterprise (SME) and distributed enterprise organizations include: GoldMine® for Customer Relationship Management (CRM); IT Service Management with HEAT® and ITIL® standards-based modules for complete service management; Communication Management including IP Office, GoldMine IP Voice Suite and IP Contact Center for reduced telephony costs and increased agent productivity, streamlined customer service and communications; and Infrastructure Management, which provides the ability to optimize the full lifecycle of a company's assets. Customers representing 44 percent of the *Fortune* 100 and 76 percent of the FTSE 100, include Coca-Cola, Shell Oil, Prudential Securities, Électricité de France, Mack Trucks, Campbell Soup, Avaya, Bechtel Corp, Bank of America, and Turner News Network. For more information, call (800) 776-7889 or visit www.frontrange.com.

AT A GLANCE

Customer:
The Green Company

Industry:
Homebuilding

Employees: 80
GoldMine Users: 30

Products:
GoldMine® Corporate Edition

FrontRange Solutions Partner:
Harvest Solutions LLC

GoldMine Business Benefits:

The Green Company maintains property and customer records, and easily links the two for faster information access and reporting, thanks to GoldMine's versatility.

Key documents like contracts are stored with each property and customer record, eliminating manual searching.

Centralized information and simple reporting lets users pull any of 35 reports in minutes, instead of hours.

GoldMine automates the scheduling of each step in the design-to-build process, keeping customers up-to-date and allowing multiple departments to stay on track.

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