

# Results Ensures Proper Project Turnaround

## Case Study: Farm Credit Services Mandan

### CUSTOMER

Farm Credit Services  
Mandan

### INDUSTRY

Financial Management

### FOUNDED

1916

### KEY CRM NEED

Needed to manage projects, generate invoices and centralize documentation and follow-up efforts.

### RESULTS PRODUCT

CRM Business Suite

### ABOUT FARM CREDIT SERVICES MANDAN

Farm Credit Services Mandan is a member-owned cooperative, offering farm operating, equipment, and real estate loans and a variety of financial management services. The Mandan Association serves a twenty county area in Southwest North Dakota. Results is utilized in support of the AgAccounting department.

### BUSINESS CHALLENGES

**Time Management.** Farm Credit needed to properly allocate and track time spent on projects. They also needed a way to generate invoices for the time spent on projects.

**Organizing Documents & Communication.** Farm Credit Mandan needed a way to track and manage internal documents and information assigned to specific technicians. They also wanted to record all communication and information flowing into and out of the office.

**Service and Follow Up.** The association needed to identify which technicians were meeting the specified turnaround period. They needed the ability to set up processes to ensure proper follow up was taken if turnaround times were not met.

### WHY RESULTS?

**Centralized Customer Records.** With Results, customer information is centrally located and can be accessed by all technicians. Contact records only need to be updated in one place. Users can easily review invoices, activities and notes associated with each customer.

**Mass Invoicing.** The Mass Invoicing feature is a seamless tool that turns billable activities into invoices. Within minutes, Farm Credit has all appropriate customers billed.

**Resource Management.** Farm Credit uses Results to manage time spent on projects, ensure deadlines are met and to assign additional resources where needed. Results provides a comprehensive view of the work that needs to be done and who is going to accomplish it.

### FAVORITE RESULTS FEATURE

Farm Credit Mandan uses the Activities Data Management Center (DMC) to ensure timelines are kept. At any time, any user can see which technician has tasks to complete, when the tasks are due, if someone is back-logged, where additional resources are needed and if promised turnaround times are met. Users can view activity comments and quickly identify if the company is waiting for information or tasks need to be reassigned.

Activities Data Management Center

Standard Search | Advanced Search | Hide Search Options | Refresh | Print Window | Export to Excel | Add/Save Reports

Include Pending Activities Only  Include Activities before today  Include Activities for the next  days only (Blank = All)

Activity ID:  Include Activities To be Invoiced Only Stated after  and before

User Name:  Contact ID:

Activity Type:  Project Code:

Clear Search Options | Apply Search

43 records found, based on the search criteria.  
Double-click a record to Edit/View it.

Completed	Assigned To	Activity ID	Activity Type	Priority	Start Date	Time	Hours	Description	Location
TOTALS							43.00		
<input checked="" type="checkbox"/>	Dwain	525	CALL	N	04/05/08	04:45PM	0:05	Follow-up call, try to move lead into a pr...	
<input checked="" type="checkbox"/>	Dwain	530	CALL	N	04/05/08	04:45PM	0:05	Call to introduce yourself, Results, caus...	
<input checked="" type="checkbox"/>	Dwain	531	EMAIL	N	04/05/08	04:45PM	0:05	Send intro email with Results flyer and l...	
<input checked="" type="checkbox"/>	Dwain	543	TASK	N	04/14/08	10:00AM	3:00	Develop invitation	
<input checked="" type="checkbox"/>	Dwain	567	INTERNET/WEB	N	04/16/08	04:45PM	0:05	Research new suppliers for mortgage insur...	

Buttons: Edit/View | Edit/View All | Add a Record | Exit

*"Results allows us to seamlessly turn billable activities into invoices. Within minutes, we have all of our appropriate customers billed."*

Todd Klee  
Farm Credit Mandan