

# CEO Forum

## CEO Forum Facilitates Company Growth with FrontRange GoldMine Premium Edition

### Customer Profile

CEO Forum

### Industry

Business Services (networking for Senior Executives)

### Solution

GoldMine Premium Edition

### Business Benefits

- Streamlined efficiencies allowing staff to dedicate more time to sales and securing potential client leads
- Central repository of information that can be synchronised across multiple office locations
- Greater visibility of all contact information throughout entire organisation
- Ability to track and record all correspondence for individual or multiple contacts at a given organisation

CEO Forum Group specialises in peer group briefings and network services for the CEOs, CFOs and HR Directors of the Australian subsidiaries of foreign-owned companies. It also operates ceoforum.com.au, a content-rich site specifically developed for the CEOs and senior executives of Australian organisations, and publishes CEO Forum, a magazine of interviews with prominent executives on key management challenges.

The company operates from offices in Sydney and Melbourne. Its membership base is restricted to the Country Head, CFO and most senior HR executive of subsidiary companies operating in Australia. With more than 400 members in total, CEO Forum Group hosts an average of 160 events per year.

Since its inception in 1993, the company has enjoyed steady yet significant growth. As the name suggests, CEO Forum Group, originally hosted events for CEOs exclusively, however over time the company has extended its reach to include CFO and HR peer groups.

### Challenges

Given the number of events CEO Forum Group hosts each month across Sydney and Melbourne, the company required a solution that could effectively manage its entire contact database.

Similarly, given the steady growth the company has experienced in recent years, it also required a more sophisticated platform to support its growing database, which contains contact information and correspondence for key stakeholders including as members, employees, suppliers and prospective clients.

Fiona Blair, Administration and Meetings Assistant for CEO Forum Group explained, "Our company has undergone significant

change in recent years. With the introduction of two additional peer groups in 2003 and 2006, our contact database has grown exponentially." She continued, "As our member base grew, so too did the number of suppliers we used on a regular basis. Subsequently, we identified the need to introduce a solution that could not only help us manage and track correspondence with members more effectively, but also help us create a central repository of all contact information."

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**Fiona Blair, Administration and Meetings Assistant  
CEO Forum Group**

Part of CEO Forum Group's growth strategy is to engage with prospective clients on a regular basis. Blair commented, "There is a constant need for us to identify new opportunities to interact with prospective clients, either via email or through hard copy correspondence."

CEO Forum Group also required a centralised way to support the core event management component of its business. The company not only needs to manage and maintain up-to-date information for its suppliers including caterers and venues but also needs to process information such as RSVPs and coordinate seating plans and payment details.

Blair explained, "Essentially we required a solution that could support us in a number of business-critical ways. First, to manage and maintain a central repository of information, including contact information for members, prospective clients and suppliers. Second, we required a solution to support event

management and finally, we also required something to help manage, track and process payment for various events that non-members can occasionally attend."

## Solution

Having reviewed a number of vendors in the market, CEO Forum Group began implementation of FrontRange Solutions GoldMine Standard Edition solution in 2003. The company's decision to implement a CRM solution of this kind coincided with its decision to extend its service to include CFOs in the same year.

Blair commented, "When we made the decision to investigate the introduction of an IT based CRM solution, we were using a series of Excel spreadsheets to manage all our contact information. As we continued to grow, we realised this system was simply insufficient and that we required a more robust and sophisticated platform that would support growth through increased efficiencies and achieve greater productivity."

Having initially used GoldMine Standard Edition, CEO Forum Group has recently upgraded to GoldMine Premium Edition, which offers an advanced service and support module and newly developed, intuitive interface to the existing CRM functionality found in GoldMine Corporate Edition.

CEO Forum Group's decision to implement GoldMine was primarily due to its ease-of-use, competitive pricing and its ability to seamlessly synchronise information between two remote office locations. "GoldMine is a particularly robust solution. It is flexible, easy-to-use and can be integrated with most existing systems. A core benefit of GoldMine for our company is the way it can be customised specifically to suit our unique business needs", Blair commented.

CEO Forum Group worked with FrontRange Solutions premier partner, TotalCRM to implement the GoldMine solution. TotalCRM not only assisted CEO Forum Group with the initial implementation of the solution in 2003, but also more recently with its upgrade in June 2008.

## Benefits

With a total of 5,500 contacts in the company's database, CEO Forum Group now has the ability to more effectively manage overall communication with each individual contact.

Blair explained, "GoldMine has transformed the way we conduct our business. Having moved from a basic Excel based system to a comprehensive IT based CRM solution such as GoldMine, we now have complete visibility of all contact information. "Ultimately, we have streamlined our entire database making it a lot easier to manage."

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CEO Forum Group has improved the way it communicates with key stakeholders. It is now able to segment its database more effectively, ensuring the right materials are sent to the right recipient, by the correct means.

CEO Forum Group has been particularly impressed with the way in which GoldMine has reduced duplication of information. Blair explained, "Through GoldMine we have not only been able to personalise all correspondence with contacts on our database, we have also become more targeted. For example, we have minimised duplication of contacts. Previously we may have had more than one contact name per company, but GoldMine has helped eradicate this."

Given that CEO Forum Group operates two offices, it was critical that GoldMine could be synchronised between the two so that information added or amended in any way would automatically be updated in both locations.

Finally, CEO Forum Group also uses GoldMine to assist in tracking some financial information. Although the company uses an external accountancy system, it leverages GoldMine to track membership renewals and other payments.

Blair concluded, "GoldMine has improved many elements of our business. We are now able to focus more time on generating new client leads and securing new members because we are no long spending unnecessary time manually inputting and updating data in an Excel based system."

## FrontRange Solutions

FrontRange Solutions develops software and services that growing mid-size firms and distributed enterprises rely on every day to build great customer relationships and deliver high-quality customer service. The company applies a unique combination of innovation and automation with a standards-based approach to simplify core business processes, including: IT service management; customer relationship and sales force management; and PC lifecycle management. More than 150,000 of the world's best-known brands use FrontRange offerings to quickly improve their interactions with external and internal clients and achieve better business results. For more information, visit [www.frontrange.com](http://www.frontrange.com)