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The Navigator for Enterprise Solutions

**CUSTOMER
RELATIONSHIP
MANAGEMENT**

EDITION

Chad Caldwell,
CEO



FASTGEM.NET

SETTING A **NEW**
BENCHMARK WITH
NICHE CRM SOLUTIONS



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*The annual listing of 10 companies that are at the forefront of providing
Customer Relationship Management solutions and transforming businesses*



SETTING A **NEW** **BENCHMARK** WITH **NICHE CRM** SOLUTIONS

By Justin Smith

A positive transformation is taking root in the customer relationship management (CRM) landscape. By tapping into the power of automation, third-party utility providers now have the ability to create synergies between sales and installation teams, unlocking unprecedented efficiencies and delivering outstanding service.

FastGem's customizable CRM system, designed specifically for third-party utility providers, is architecting this new paradigm.

Whether it's internet service providers, home security, satellite, TV or solar energy installation companies, FastGem provides a wide range of capabilities to manage both sales and installation operations while helping keep track of existing customers and attract new ones.

"By connecting sales and installation technicians, we help clients manage customer experience all the way from lead generation to product purchase, installation, and beyond," says Chad Caldwell, CEO of FastGem.

DELIVERING VALUE WITH INNOVATIVE FEATURES

FastGem CRM is packed with powerful features to fulfill every need of a third-party utility provider that sells products from multiple vendors.

Information asymmetry can create difficulties in lead processing, installations, inventory management, and commission-based payroll.

To strengthen clients' lead generation efforts, FastGem offers forms for prospective customers to complete. Representatives have easy access to a list of leads from these forms and can use the CRM system's direct marketing



Chad Caldwell,
CEO



Krista Lambert,
Director of Operations

capabilities, including text messaging and email campaigns, to convert the leads into customers.

Solution sellers must always be cautious about the security of customer information when they use multiple vendor portals to manage and track operations. The process is prone to fraud as unchecked reps have the ability to reuse sensitive data across different portals, like customers' credit card numbers and social security numbers. This is where FastGem's cross-portal fraud prevention web plugin comes into play, providing layered permission options and restricting employee access to the information necessary for their operations. It sends automated alerts to clients if any data point is reused and sets different flags to warn them so that fraudulent activity can be immediately curtailed. FastGem also enables clients to push and pull data in and out of the CRM system and move it to various portals through its Chrome extension to speed up processing. Other CRMs require users to copy data from the application and enter it into different portals when making a sale. FastGem's extension helps clients integrate the information they need faster.

Sometimes, clients want to exchange information with other systems, which is not possible with siloed, obsolete platforms.

FastGem provides integration support with full REST API that facilitates basic data operations—create, read, update, delete (CRUD)—in near real-time. Integration with a processing platform, an external BI tool, or other systems and applications are seamless, enabling clients to share and update data instantly and achieve their business goals.

SOLUTIONS CRAFTED WITH DEEP-ROOTED EXPERTISE

Selling products is just one side of the equation. Clients need to deliver seamless installation services to ensure complete customer satisfaction. FastGem allows clients to set rules on how to interact with customers to initiate and complete installations without hassle. For example, customers can be informed about their scheduled installation a day before via a text message, with customizable outbound text messaging for installation confirmations.

BY CONNECTING SALES AND INSTALLATION TECHNICIANS, WE HELP CLIENTS MANAGE CUSTOMER EXPERIENCE ALL THE WAY FROM LEAD GENERATION TO PRODUCT PURCHASE, INSTALLATION, AND BEYOND

Service standards are further elevated by FastGem's quality control module that allows clients to follow up with customers and respond to their requests post-installation. The system also has a built-in referral program for nurturing customer referrals and managing payments. For example, upon receiving a referral, clients can use FastGem to keep track of the process and pay the referral bonus to that customer after the lead is converted.

Clients can also generate customized notifications for customers. For example, when a customer enrolls with a new service provider that grants a complimentary six-month streaming subscription, charges that begin the following month can come as an inconvenient surprise. With FastGem, customers are promptly informed about the expiration of their free subscription, empowering them to make an informed choice about whether or not to continue to subscribe. These features contribute to ensuring customer satisfaction.

RECONCILIATION MADE EASY

A robust and impressive feature is reconciliation, which helps clients authenticate payments received from multiple vendors and streamline payroll operations. The system ingests vendor reconciliation data and reports to clients about how much they are owed and paid. It also automates commission and payroll calculations to expedite payments to sales reps, technicians, and the managerial staff.

In one instance, FastGem helped a client streamline their cumbersome, manual payroll process. Before FastGem, it took two to three days every week for the client to figure out the exact amount that every sales rep earned with many permutations of downline overrides, bonuses, and other parameters. The FastGem team accelerated the process from days to minutes. The client was able to enter the credentials for bonuses and downline overrides and save eight days a month. Investing that time in higher-order tasks, they tripled their profits in six months.

The value delivered by FastGem's CRM system is not complete without the extensive reporting feature. Clients are provided with easily-accessible, customizable reports that consolidate data pertaining to sales, including the performance of reps and technicians, lead conversions, and installations, to quantify their success.

FastGem understands that creating positive experiences for the sales team and keeping them motivated is as important as delivering on customer expectations. Stoking a team's passion can lead to productive cadences, which reflect in the services they deliver. With a gamified leaderboard, FastGem allows clients to motivate sales reps, analyze where they stand in weekly or monthly performance across the portals, and award performance bonuses. These dynamic experiences and techniques go a long way in keeping teams engaged and productive, which translates to more sales.

TETHERED TO A CUSTOMER-FIRST MENTALITY

"Customer satisfaction is a top priority for us. We follow a systematic, white-gloved approach to ensure a positive experience, from onboarding and implementation to support," says Caldwell.

Every client is assigned an individual account manager who handles importing their data to the FastGem system. After onboarding, the customer service team follows the "train the trainer" approach, where they train a leader in the client's organization to train other employees. Clients are also provided with articles and videos to obtain the maximum benefits from the solution. The support team is just a call or email away, providing clients individualized attention and full-service satisfaction.

"We have been constantly innovating our platform to align with evolving client demands," says Caldwell. "Client requests



Emily Campbell,
Director Customer
Experience

CUSTOMER SATISFACTION IS A TOP PRIORITY FOR US. WE FOLLOW A SYSTEMATIC, WHITE- GLOVED APPROACH TO ENSURE A POSITIVE EXPERIENCE, FROM ONBOARDING AND IMPLEMENTATION TO SUPPORT

for new features drive the innovation of our CRM system. When they request a particular capability, we ensure it is quickly implemented."

FastGem is planning to dive deeper into solar energy installation processes and add more capabilities to its system to help clients solve complex calculations for commission-based payroll. It also aims to bring features to streamline fulfillment by using IoT to help clients better manage their fleet, quickly scan barcodes, and automatically update inventory. [CR](#)