



Replacing an expensive and hard-to-use CRM solution



**TeamScope Software**  
23679 Calabasas Road  
Suite 140  
Calabasas, California 91302

Tel.: 818.876.0776  
Fax: 818.876.0779

[www.teamscope.com](http://www.teamscope.com)  
[sales@teamscope.com](mailto:sales@teamscope.com)

## ***Company Profile: The Kelsey Group***

Founded in 1986, by John F. Kelsey, III and Pamela S. Kelsey, The Kelsey Group (TKG) is the leading provider of strategic research and analysis, data and competitive metrics on Yellow Pages, electronic directories and local media. TKG delivers high-value market intelligence and actionable recommendations in the form and at the time clients need them:

- [Continuous Advisory Services](#)
- [Consulting](#)
- [Research](#)
- [Conferences](#)

TKG's products and services evaluate business, social, economic and technology trends that are changing the local market, and the effect these trends will have on clients' businesses. TKG continually builds on its knowledge base through daily interaction with clients and proprietary research.

[Kelsey Group clients](#) are senior executives of companies that need independent, objective perspectives on Yellow Pages, electronic directories and local media. Importantly, TKG's focus is on business strategy and marketing rather than the technology itself.

## ***The Challenge***

For well over a year, the employees of TKG had been struggling with their commercial CRM product. So far they had spent over \$50,000 in software, hardware and training services and still were not satisfied with the results. In fact, many of the users had given up and stopped using this CRM solution.

As a result, TKG recognized that it had the following critical needs:

- **Support of remote users**  
No support for remote users over a dial-up or high-speed internet connection was available, and the current CRM solution's support required synchronization that could only be performed for one user at a time and which often corrupted both databases. A solution that took advantage of the investment made by TKG in Microsoft Exchange would be able to address this.
- **Customization of forms**  
The current CRM solution had forms that required users to input a lot of information that was not always required or even known at times. Forms needed to be customizable so they could be tailored to TKG's business needs.
- **Easy to use with little training**  
Sending the users to day-long training sessions was unacceptable since this nearly doubled the cost of deployment. An easy to use solution integrated with Microsoft Outlook would be much easier for everyone to use.

## ***The Solution: TeamScope***

Chris Kelly, the System Administrator at TKG, decided that since all of the users already were using Microsoft Outlook with a Microsoft Exchange server, this could be a great platform for a future CRM solution. While developing a custom CRM system based on Outlook Public Folders, Chris discovered Teamscope CRM™ *for Outlook*® and realized that it would solve his problem for far less than it would cost him to develop and maintain his own solution.

With Teamscope CRM™ *for Outlook*®, TKG was able to fully support remote users whether they were connected or offline. Teamscope CRM™ *for Outlook*® also provided users with the ability to view the CRM information in any way they wanted, as well as providing custom forms designed for their unique business needs. Another big benefit was how easy Teamscope CRM™ *for Outlook*® was to use, with most users becoming productive after less than an hour of training.

*"All I had to do was show users how to use the Teamscope CRM™ for Outlook® toolbar – they just had to click on the icons from left to right. They were immediately productive and able to work without all the headaches of our previous CRM solution.  
All this for a fraction of the cost!"*

**Chris Kelly  
System Administrator  
The Kelsey Group**

## ***TeamScope Benefits***

TeamScope Software develops and markets CRM and other collaboration software based on Microsoft's Outlook and Exchange Server technology. Utilizing the advanced data integration and communication capabilities of these key Microsoft platforms, TeamScope creates products that accelerate business processes and dramatically enhance individual and group productivity.

Fundamentally, TeamScope's software products augment and extend Outlook and Exchange to supply dedicated business solutions for broad classes of business needs, such as Customer Relationship Management (CRM) and business process workflow control.

TeamScope was founded in 1999 by software industry veterans Phil Seeman and Paul Woodworth. The founding principle of the company is to make work easier to do and to increase management effectiveness in daily business operations. While many software products offered in the market today are installed as separate applications, TeamScope's unique approach is to create advances within the Outlook/Exchange environment itself. By doing the extra work to tightly integrate these systems, TeamScope solutions streamline any business function that incorporates email communication, contact management, or task coordination.

## ***TeamScope Means Outlook Success***