



Case Study – Business Services

CEO Forum Group



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Administration and Meetings Assistant, CEO Forum Group

CEO Forum Facilitates Company Growth with GoldMine Premium Edition

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. With more than 400 members in total, CEO Forum Group hosts an average of 160 events per year.

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. 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.”

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.”

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Fiona Blai

Administration and Meetings
Assistant, CEO Forum Group

Solution

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 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. We now have complete visibility of all contact information. Ultimately, we have streamlined our entire database making it a lot easier to manage.”

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.”

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.”