



Premier Art Fundraiser No Longer Needs Crystal Ball

Regency Fine Art Chooses ISIS Over Salesforce to Manage Customer Relationship Information and Discovers Powerful Forecasting Capabilities

ORGANIZATION:

Regency Fine Art



LOCATION:

Norcross, Georgia

INDUSTRY:

Fine Art/Fundraising

TASK:

Centralize information and facilitate internal and external communication.

"The biggest surprise with ISIS has been its forecasting capabilities. We have been in the business over 30 years and have always needed a crystal ball to forecast. With the projects and opportunities reports, for the first time we have had an accurate picture of what is in the pipeline. It has turned out to be the biggest benefit of the program."

Lester Herbertson
Owner
Regency Fine Art

The Organization

On the cutting edge of the art market for over 30 years, Regency Fine Art is a multi-faceted gallery with long standing customers around the globe. As a full service gallery and pioneer of fundraising art auctions, Regency Fine Art offers the art collector, as well as the charitable organization, the most comprehensive selection of art in the industry.

The Challenge

With over three decades of success, Regency Fine Art's solid reputation in the art and fundraising communities has built a client list numbering in the thousands. Four different databases housing client and art show data were merged into one database in July of 2004. With the data centralized, the search began for a system to organize access and communication.

Lester Herbertson, owner of Regency Fine Art, puts it this way, "We needed something to bring the team together and share the database and allow different people involved with the client to access the information. Duplication of efforts –two people calling the same client – and the need to streamline communication and information access brought the situation to a head."

The Solution

Herbertson chose Computer All's flagship product, Integrated Source for Internal Systems (ISIS) to achieve his organizational communication and information access goals. Having used Computer All to bring their four customer databases together in *SHOWMAST(er)*, an online organizational control center for auction and client data, it was a natural fit to look to Computer All to further integrate their information processes.

The changeover from Outlook, which had been used for contact management and email needs, took place in October, 2005. "I was comfortable in Outlook and went kicking and screaming from Outlook to ISIS only after all my files were transferred," said Barbara Roller, Art Auction Coordinator and Regency Fine Art's ISIS point person. Roller is now operating in ISIS all day long and logs in everything she does. Having worked in the art business for 27 years, she spends her days on the phone selling and coordinating booked auctions. Task lists show at a glance what she needs to do, i.e. managing 20+ activities for 20+ companies, multiple meetings and phone calls in a typical day.

ISIS has demonstrated many advantages for Regency Fine Art including:

- ISIS allows users to manage multiple tasks.
- Tasks can be sent to other users from the contact manager.
- Leads are automatically dumped into ISIS. Emails no longer need to be printed out and retyped.
- Modules are refined to handle internal information, i.e. ISIS sends meeting requests and automatically generates email reminders to check tasks.
- The transition to ISIS has been invisible to clients.

Another CRM solution, Salesforce, was considered before the final choice was made. Herbertson says, "I was impressed by the personalization of the ISIS team. I didn't feel like a number. I had people to talk to and understand my business. People who cared about my business. They weren't just signing up another client.

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Integrated Source for Internal Systems (ISIS)

ISIS, Computer Alli's flagship intranet product, provides comprehensive business applications and information management without the hassle of buying, installing and updating software. 100% web-based and completely customizable – a key feature – ISIS is accessible online anytime and anywhere. So secure, meeting banking industry standards, ISIS guarantees you'll never worry about your data again. Key performance indicators are available at a glance on the ISIS executive dashboard. Easy to implement and use, ISIS streamlines business operations and lets you focus on driving your organization's success.

Centralized Communication and Workflow Management

"I can pull reports during the day to get a fast glance at what I'm missing," explains Roller, "and at the end of the day I can pull a report to see what everybody did." The goal is to have users log in all client interactions. If anyone talks to anybody regarding a fundraiser, they make a note of that conversation. Roller considers the result a big plus for Regency Fine Art: one central location where the information on each show is kept.

Customized Modules

After initially implementing and using ISIS, Roller developed a list of problems and requests for enhancements. The ISIS team listened and made all of the modifications Regency Fine Art was looking for. Roller finds it very convenient to have one support contact person who directs her calls to the appropriate ISIS system developer.

By January, 2006, everything was running smoothly. Improvements are ongoing with an enhanced email module currently in development. "New components in ISIS sound very exciting," states Roller.

Is ISIS cost effective? According to Herbertson, most of the applications Regency Fine Art needed already existed and the cost of modifications was reasonable.

Forecasting

With no formal planning process in place before ISIS, shows were tracked only after they were booked. Using ISIS gives Regency Fine Art a step up in planning through the Opportunities and Projects Module. Now Regency Fine Art can track prospects and project the success of opportunities by assigning a value of 40%, 60%, 80% and so on, forecasting the date of the booking and level of profitability. This helps in planning how much product will be needed and when. "We have a better handle on what we're anticipating – booked shows, shows in the pipeline and probability. I can pull a report whenever I need to and there are multiple ways to get information," notes Roller.

The Future

Herbertson and Roller agree that ISIS will play an integral part in their vision of Regency Fine Art's future.

Roller foresees, "Constant growth. ISIS will facilitate an ease in planning and making decisions – where we are going to go and what we are going to do."

"Forecasting is the biggest benefit of ISIS," Herbertson concurs, "I can't imagine the future without ISIS. It has given me more information to guide my business than ever before. It is a direct line to what is going on in my business."

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