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FACTS deploys WebEx enterprise-wide and improves customer support, increases market reach, and generates new business.



INDUSTRY

Financial services for schools and colleges

WEBEX APPLICATIONS

Training Center and Support Center

SUMMARY

Relying on in-person meetings for sales, training and support purposes was preventing FACTS Management from effectively expanding market reach and improving customer support. FACTS now uses WebEx Support Center to easily solve customer support issues remotely and WebEx Training Center to provide frequent technical trainings and marketing presentations. As a result, WebEx has streamlined FACTS operations, dramatically increasing customer reach and sales while making the organization more nimble.

ABOUT FACTS MANAGEMENT, A NELNET COMPANY

Line of Business

Financial services for schools and colleges

Headquarters

Lincoln, Nebraska

Number of Employees

200

WebEx Customer Since 2001

Committed to enhancing the financial stability and affordability of educational institutions, FACTS Management serves more than 3,500 schools, colleges and universities, and more than 650,000 families. Through its core IT tuition management systems, FACTS provides various financial services including low-cost, automated payment plans to families and students, and financial needs assessments for K-12 schools. The company manages over \$1 billion in tuition funds each year.

The Challenge

In 2001, FACTS Management was facing two significant challenges. Face-to-face sales calls by the company's 15 salespeople were too time-consuming, costly, and ineffective in reaching prospective clients geographically dispersed across the US. At the same time, technical training and support of FACTS tuition management systems were also proving difficult. “We either send our technical staff to the client site to install and train on our software or we'd guide our customers through a blind telephone install. Our support specialists couldn't see what customers were seeing on screen,” says Randy Bretz, Senior VP of Marketing and Communications for FACTS Management. Often, zipped data or documents with embedded screen shots would have to be sent back and forth until a support problem was solved.

The Solution

To overcome the company's marketing and customer service obstacles, Bretz began searching simultaneously for remote support and online meeting applications. “For support, we looked at PC Anywhere

but it required installing software at each of our customer schools, so it wasn't an option for us.” While reviewing WebEx for its online meeting capabilities, Bretz discovered WebEx Support Center. “When I heard WebEx allowed for the remote access and control of computers without requiring client installation, I immediately asked for a demo and was sold,” he says.

Using Support Center, FACTS technical support staff now address its customers' support issues in real time by sharing their desktops or taking control of their clients' computers when necessary. “With Support Center, conducting data analysis is really easy. We copy the data we need from the client's computer to ours. Our support staff then analyzes the data offline, fixes problems found and sends the corrected files back to the client,” explains Bretz. Internally, FACTS uses Support Center to provide support for the laptops its salespeople use when they're on the road.

Bretz's satisfaction with Support Center led him to choose WebEx for the online meeting and presentation applications FACTS required. WebEx Training Center was quickly adopted throughout the company for a variety of purposes including marketing, technical training and internal meetings. Using WebEx, FACTS now provides regularly scheduled meetings to attract new colleges and K-12 schools. “We conduct live K-12 presentations once a week and college presentations monthly, with up to 20 schools in attendance at each. Prospects simply register online through the FACTS corporate site,” says Bretz.



FACTS also uses Training Center to easily target different market segments. To market to small Christian Bible colleges, for instance, FACTS recently invited several of its faith-based client colleges to offer live testimonials during a series of WebEx sales presentations. The presentations were customized for each region. According to Bretz, "The targeted online presentations were very effective, and it was easy to coordinate the participation of customers who were located in different states."

Online technical trainings on a range of FACTS applications are now conducted twice a week. "We share our applications with our customers. By showing the FACTS software running on our machines, we can dynamically train our customers on a variety applications, such as how to configure an electronic cashier at a K-12 school," Bretz explains.

To integrate WebEx at FACTS, Bretz formed an implementation committee that consisted of participants from five departments, including tech support, sales and software programming. "The team spearheaded the WebEx initiative and it took off from there," he says. Today, a third of the company uses WebEx for internal purposes and approximately 100 schools a year are trained online. "We have 75 employees trained on WebEx including an elite group of 12 who focus solely on training our institutions. It's become a badge of honor to be part of the WebEx-certified team at FACTS," says Bretz.

The Benefits

By improving the efficiency of its operations, WebEx has given FACTS the flexibility to act quickly on new opportunities and seamlessly grow its business. When FACTS took over the tuition management services of Evangelical Christian Credit Union (ECCU) in California, it used WebEx Training Center to conduct two presenta-

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— Randy Bretz, Senior VP of Marketing and Communications

tions a week for the new schools in its customer base. Within four months period, FACTS had trained all 100 of the newly acquired institutions. Using WebEx enabled FACTS to quickly integrate a large amount of new business into the company's operations and realize a critical time-savings.

In addition, FACTS has incorporated WebEx into its new customer acquisition process and retraining activities, facilitating the company's average acquisition of 500 new clients a year and ensuring its 3500 customer institutions remain fully trained. According to Bretz, "Before WebEx, most of the new and existing school trainings had to be conducted in person. Now, our processes are not only more efficient but we also provide a more thorough training experience to our customers."

Using Training Center to present targeted online marketing presentations has also proven to be highly effective in generating new business. "One of our online presentations focused on what FACTS did for one college in Texas. From the 12 Texas schools that attended the presentation, we closed four new contracts. That one presentation resulted in a 30% close rate for us," Bretz remarks, adding, "It was very effective to enable the schools to participate in a dialogue about how they could achieve results similar to those of our featured institution—right from the comfort of their own offices."

With WebEx, FACTS meetings can now be conducted any time, anywhere. Bretz recalls that he had a scheduled meeting

with the Archdiocese of Los Angeles when his flight was delayed in Texas. "Instead of rescheduling the meeting, I just turned on my laptop and conducted a WebEx presentation right from the gate." Bretz continues, "Now our sales team can easily make online marketing presentations to multiple schools across the US within an hour. With each trip averaging \$700, using WebEx has resulted in significant time and cost savings, while helping us adapt more quickly to the ever-changing business environment."

The Future

Due to the positive business results the company has realized over the years, FACTS plans to continue using WebEx to address new company objectives. Fully incorporating WebEx into its new-customer acquisition process is an initiative that was recently launched at FACTS. "Within the next few months, we will be rolling out the new process, which involves providing online one-on-one orientation meetings for all new schools. We'll be increasing our use of Training Center for this," says Bretz.

Through a series of educational online presentations, FACTS is also planning to transition its clients to paperless record-keeping. "We will be teaching our clients the benefits of downloading tuition payment reports as pdf files," explains Bretz.

Over the years, FACTS has found many critical applications for WebEx and anticipates finding even more. "From technical support to marketing and training initiatives, WebEx is truly an integral part of the FACTS organization," Bretz concludes.

HIGHLIGHTS

- FACTS sales, training, and support processes often required in-person meetings, limiting the company's market reach and quality of service.
- Using WebEx Support Center, FACTS now solves customer software issues remotely in real time.
- WebEx Training Center enabled FACTS to conduct frequent technical trainings and targeted marketing presentations that dramatically increased customer reach and sales.
- Anytime, anywhere meetings have given FACTS the flexibility to quickly adapt to an ever-changing business environment and to seamlessly grow its business.