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*“ClarifyOffice™ puts everything together and it’s simple to use.”*

**Mark Coccio**

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## Quick Facts:

### Industry

Direct  
Marketing

### # of Users

35

### Objective

*“We were looking for an auto responder and lead management system to replace our current system.”*

## CUSTOMER PROFILE

Mark Coccio is an independent sales representative of WMI Inc. He works from home, managing a team of people who follow his lead. He has proven his success time and again and has helped others gain the benefits of working from home, running their own businesses.

## CHALLENGES

Mark and his team were in need of an email-marketing platform and pipeline management solution. Their previous provider was going out of business and he needed something to replace it in a short period of time.

## OBJECTIVES

Mark and his team had already implemented marketing strategies that were creating high-quality leads, but they needed a system to manage them efficiently. They sought a hosted solution that delivered:

- ✓ Easy distribution of leads from management to the field
- ✓ The ability to create email campaigns and duplicate them for each sales agent
- ✓ Reliable email delivery of their various campaigns.

## SOLUTION

The ClarifyOffice system proved to be the tool that Mark and his team were looking for. They set-up one ‘master’ Clarify account and duplicated its configuration for all 35 of his sales team members. Folders, forms, fields, files and campaigns were configured for maximum duplication throughout the

organization. Mark says, *“For us, the key part of the Clarify platform is the ability to provision our team members with a custom solution we control, allowing our processes to be streamlined and standardized. We can literally bring someone in and get them operating in minutes.”*

Stored queries allow each sales agent to drill-down into their database and compile only the contact data they need at a given moment. Web leads feed directly into the campaign engine, triggering instant communications to the prospect. *“The ability to organize our data according to our unique business rules has been essential for us, and we’ve gotten much better at it over time. It’s been a huge improvement for us.”*

## RESULTS

Mark and his team were able to get up and running quickly and discovered that ClarifyOffice delivered exactly what it promised. *“The Clarify suite has proven to be a major help to us.”* Its given Mark and his team:

- ✓ The ability to set-up new auto responder campaigns with ease
- ✓ An effective contact management system
- ✓ Peace of mind that all emails are being delivered

Mark has also had the opportunity to work with the customer support team and ranks them ‘the best’. *“The ClarifyOffice system has met all of my expectations.”*