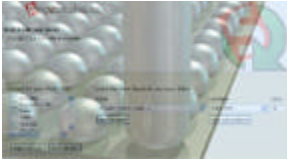


Global instrument manufacturer fast-tracks Salesforce.com – engages Siftwork to customise, import data and train team.



About this project

This UK-based client provides high-value instruments, accessories and services to electronics manufacturers around the world. It offers two distinct product ranges which are sold by independent teams each of which comprises a blend of direct and indirect resources.

The service and support activities are conducted by a combination of directly-employed and agent-managed engineers with the possibility of multi-level escalation for complex cases.

Therefore detailed customer, installed base, service entitlement and warranty information was dispersed and inconsistently formatted in local offices using dozens of languages and a handful of different character sets.

The business did not use a CRM system although some of its remote offices had some experience with stand-alone, DIY customer databases. As a result all the customer communications were individual and there was no centralised enquiry, lead management or support case administration.

Sales forecasting was cobbled together using multiple spreadsheets that suffered from inconsistent definitions and layouts and were not genuinely multi-

user. This eroded confidence in planning. Marketing campaigns were often poorly targeted and difficult to measure. Contacts were not tagged with campaign membership hence there was a risk of repeated or conflicting messages.

The business decided to trial and subsequently to adopt Salesforce.com partly because of a sister company's experience.

The client engaged Siftwork to deploy a fully populated CRM system recording and managing leads, customers, installed base, service case, service contract and prepaid preventative maintenance (PPM) visit records.

Our role

We followed a substantial learning programme to fully understand the client's requirements and those of its customers. While a Filofax might have similar deployment across many different business types it was clear that any dedicated CRM system for this client required substantial customisation and enhancement. We also discovered that the client's internal organisation suffered inconsistencies that could not be replicated in the CRM system and which, together, we had to resolve.

We prepared a programme that would lead from a zero starting point to a fully functional Salesforce.com roll-out to several dozen dispersed users in a few months. This programme comprised the following main stages...

Firstly we collected and consolidated all customer and installed base data from remote offices and agents around the world, as far as possible corroborating this with factory production records. We customised Salesforce.com to store, display and analyse all the data types collected. These included accessories for Assets, service contracts, PPM visits, etc, using new data fields where necessary in existing and new objects which we created. We then imported the data using the native Salesforce import tools or more advanced tools where necessary. The data sources for different objects didn't contain any common fields so we had to devise data matching processes.

We set up the Territory Management feature in Salesforce to accommodate the two product ranges and the detailed data security requirements associated with multiple sales and service partners.

Using both classroom and web-based resources we delivered training and motivation materials across the globe for the application itself and for external report and dashboard creation. Sometimes this meant providing additional functionality that individual offices claimed to have enjoyed with previous local customer database systems. We had already learnt elsewhere that high initial data quality provided users with both value and motivation.

We wrote reports and dashboards using both the native Salesforce report writer and where this was inadequate we used Crystal Reports on downloaded data copies. We provided a mapping (GIS) solution linked with Salesforce intended to provide simple mapping features but possibly also territory assignment by drawing territory boundaries where these don't follow geographic or administrative boundaries. To guarantee the future value of the client's investment we automated the data quality measurement and tracking of more than a dozen important attributes.

Results

The client received a fully populated and sophisticated global CRM system enabling much more effective and transparent management of sales, service and marketing operations. This contrasts with its previous dispersed and inconsistent data stacks that were not accessible from the head office. It also profits from a single Leads database which can be used for both acquired data and unqualified prospect data. In addition it now follows a precision data security and access plan for all authorised users in direct and indirect sales teams. Precision paper, e-mail and telephone campaigns can now be run where members are selectable by any database attribute and their campaign membership is automatically recorded. (cont)

The new single, coordinated forecasting system aggregates granular information from individual partner level in even the smallest territories right up to a global corporate view.

More information about this project

If you need more information about this project or if your organisation has a comparable need please ask us to discuss it with you. You can contact us at www.siftwork.com or on +44 (0) 1628 629576.