

SQWARE PEG CASE STUDY

RICOH

Situation

Following a successful introduction to Salesforce through marketing for Campaign management and an in-house trial in Adelaide, a centralised Project Management Office team at Ricoh engaged Square Peg to configure and deploy Salesforce nationally.

There were a number of objectives for deploying Salesforce. Ricoh's primary goal was to deploy a world class solution to centrally capture the voice of the customer and use this knowledge to continuously improve the level of service to their customers. Additionally, there was a requirement for a more consistent and visible approach to sales management - managing leads through to an opportunity and to feed directly into reliable supply chain and pipeline management.

The system would enable the Account Managers to be better and more immediately informed on interactions with the customer, and be able to proactively manage existing accounts and apply a more scientific approach to meeting the needs of customers. The Account Managers also needed a greater ability to be proactive in managing issues before they escalated, as well as access customer and prospect details remotely. Ideally, Salesforce would also replace the existing CRM system, and series of related sub-systems. The administrative burden of reporting for head office would also be further reduced, and the system would also enable more time critical forecasting information to Ricoh's supply chain management process.



From a business continuity perspective the system would provide assurance to Ricoh's customers that their information and interactions with Ricoh would persist if a sales person were to leave. It would also provide a means to ensure Ricoh's workforce were more evenly distributed in their territory deployment.

"The simplicity and flexibility of Salesforce is remarkable, and when coupled with the insight and experience of Square Peg, we were able to make the necessary configuration changes in real time and rapidly onboard out entire sales team, in less than 6 months and at fraction of the original budget estimate."

Robi George, National Business Excellence Manager

Challenge

The challenge was to configure and deploy Salesforce nationally, and facilitate the replacement of the trial instance in Adelaide, on time, and on budget.

The purpose of the project was to implement the customer account and opportunity management system with a methodology that would streamline the sales process and more accurately meet the needs of customers. The system would hold a central view on all relevant activities occurring in the account such as product utilisation; credit status; service history and general customer touch points.

The system also needed to incorporate security between branches and sales channels to only permit access to information within their territories.

Ricoh needed a better way to:

- i) manage and consolidate all key customer information into one system. Customer information was stored in several discrete systems and was difficult to access and therefore duplication was a problem.
- ii) generate the national pipeline view and to extract reports for account managers and the sales management team for forecasting.
- iii) handle approval processes which required manual forms to be printed and signed introducing unnecessary delays in the process.

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Solution

Square Peg recommended a new instance of Salesforce, incorporating the business processes for sales, leads and account creation management. Other useful and working functionality from the original pilot system was migrated to the new instance. As an initial phase, assets from Ricoh's ERP system were loaded on a scheduled basis to enable visibility of asset utilisation for Account Managers.

A clear process map was drawn out and all stakeholders of different business units were surveyed with several workshops to capture requirements and suggestions for the improved CRM system. Leveraging Square Peg's iterative approach, Salesforce was configured and built and feedback was taken from the project team. With this methodology, the project team and end-users were able to see the solution as it was being built. Unit testing of each functionality was carried out using live examples and sample sets of data without disruption to the system overall. Because the implementation was carried out on a brand new system, the testing environment became the live instance fast-tracking the go-live date of the project.

Salesforce Automation was the core component of the solution with some integration with Ricoh's central Enterprise Resource Planning (ERP) system System 21.

Results

Together with Square Peg, the national projects team was able to deploy the brand new instance of salesforce.com to all customer facing staff nationally. ***What was going to take 12 - 18 months was done in 6 months, and for less than half of the original estimated cost, while at the same time mitigating the risk component.***

Square Peg played a central role in the project team and in the successful deployment. Working closely with Ricoh, Square Peg was able to advise both at the process and application level using insight gained from similar deployments in similar and different industries.

Salesforce has become a platform on which Ricoh continues to strive for performance excellence in service delivery to customers, and Square peg is an integral part of that journey.



For more information on Square Peg services please visit www.squarepeg.com or phone +61 (0)2 9299 9001.

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