

## SQWARE PEG CASE STUDY

# Maclean Computing

### Situation

Since 1993 Maclean Computing has been supporting the growth of local businesses through the delivery of Rock Solid I.T. Foundations. Their goal is to provide companies with the latest IT technologies and services to improve their business and reduce overall costs.

Maclean's vision is to deliver products and services in such a manner that they are recognised as the best provider of business computers, networks and broad-spectrum software solutions to mid-sized New Zealand businesses.

Maclean Computing recently embarked on a CRM implementation aimed at complementing its existing ERP System with the addition of an easy to use, adaptable and quick to deploy CRM Solution.

After a rigorous market analysis consisting of investigating traditional CRM Premise-based solutions and Cloud Computing solutions, Maclean Computing selected [salesforce.com](https://www.salesforce.com) as the platform of choice, with [Squire Peg](#) as the key implementation partner.



### Challenge

Facing ever-tightening budgets and the challenge of sales growth expectations in a mature market, Maclean's management team were conscious of the need to maximize visibility in sales team effectiveness and activity. There was an urgent need for real time information to assist the business with its growth targets and there were some significant manual processes that needed automation, in order to reduce costs and ensure a consistent approach with customers.

Key Project objectives included:

- Better pipeline management

- Better visibility of key metrics (for sales person, sales manager and the executive team)
- Automation of the quotation process involving multiple suppliers and 1000's of products
- Asset tracking for identifying natural replacement cycles and cross-selling opportunities
- Activity Management to ensure that events and tasks are effectively tracked and followed up

The existing business process was complex and cumbersome and involved the following steps:

1. The salesperson and presales consultant would define at a high level the proposed hardware and software solution, based on the customer's requirements
2. The presales consultant would then work with the sales support team to put together quotation(s) for the customer
3. The sales support team would collate prices sourced from a range of different suppliers, who all provide regular price updates in Excel format, and determine relevant margin and revenue calculations
4. Then, using a complex Excel template, they would provide quotations for the customer that could be high level (i.e. hardware, software, implementation, support grouped together) or low level (individual products and individual prices)

**"We have been impressed by Squire Peg's commitment and skill in identifying ways to bring this reasonably complex set of requirements under control...."**

**Allan Maclean, Chairman, Maclean Computing**

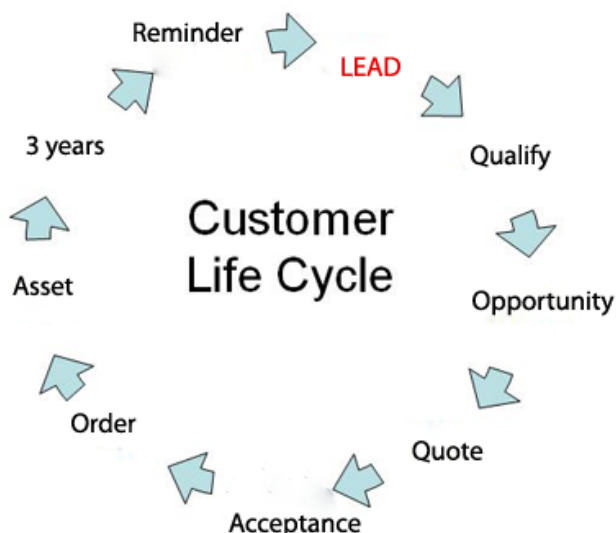
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5. This quotation could go through numerous iterations before finally being agreed upon by the customer
6. Individual orders (again using Excel spreadsheets) would then be placed against the relevant suppliers
7. These would be delivered either to the customer site or to Maclean Computing, where configuration would commence and serial numbers, warranty details would be recorded manually

## Solution

Squire Peg engaged directly with the project team to ensure full understanding of the key business and technical requirements. It quickly became apparent that the flexibility provided by Salesforce coupled with the initiative provided by Squire Peg meant that there was an opportunity to drive significant value for Maclean through automation of a customer's lifecycle through the following approach.



Leads would be qualified by the sales teams and converted to prospective accounts with opportunities created at the same time.

The complete quotation process was automated within salesforce.com utilizing existing Objects in the CRM System such as Products and Quotes and some Visual Force development work to ensure that quotations could be developed quickly and easily.

### Key elements included:

- All the **products and prices** from the various suppliers are automatically added into Salesforce using Informatica on a regular basis
- Within the Quotes section, a user is able to search for a generic product name (e.g. DL380 Server) and to obtain all supplier products based on the search criteria and select the most relevant products and pricing
- Users can also search based on a template (e.g. Database Server) and the predefined list of all products would be available and can then be selected
- **Multiple quotes** can be generated automatically from within the system in a PDF format and saved on the opportunity record
- Once the Opportunity moves to 'closed won', automatic workflow is then used to communicate with the sales support teams and project teams
- A custom object called 'Orders' was developed in order to **create multiple orders** for different suppliers with the creation of a PDF order that was automatically emailed to the supplier once approved by the sales support manager
- The equipment is then delivered and engineering resources are allocated, again utilizing **automatic workflow**
- Once the project is complete the sales support person would select the relevant products within the opportunity and click to create an 'asset' against the account. The corresponding serial numbers and warranty details would also be recorded
- **Automatic licence and warranty expiry reminders** would then be sent out to the relevant account managers after a defined period

All of the above functionality was delivered using the Squire Peg 'Iterative delivery approach' ensuring that all levels of complexity were dealt with throughout the lifecycle of the project.

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## Results

Even though it's still early days, the general level of enthusiasm for the new CRM System shown by the sales teams and the executive team seems encouraging. All opportunities are being accurately tracked and there is now access to real time data and reports allowing the executive team to drive the business forward, with regard to both acquisition and retention.

The Reports and Dashboards implemented allow real-time visibility and effective measurement of the KPIs at the core of sales team success.

Complex processes involving different elements (suppliers, products, quotes, sales processes etc) have been automated and embedded into the Maclean business methodology and there is now a single source of the truth with regard to the customer life cycle, which was one of the key aims of the project.

Measurement and visibility has led to improved tracking of performance, and the Maclean management team can now promptly see if the Sales and KPI performances are tracking towards plan.

"...We now have an exciting solution that will continue to improve our sales performance, but is likely to extend well beyond that division as we drive it further into the organisation over time."

Allan Maclean, Chairman, Maclean Computing

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For information on Maclean Computing sales programs please phone +64 (09) 377 0840 or visit <http://www.maclean.co.nz>