

Enterprise Software Producer Modernizes Its CRM Platform—and Tames Business Complexities



Location /
United States

Company Size /
200

Industry /
Computer Software

Solution /
Siebel Retirement
with Salesforce.com
Sales, Service &
Marketing Clouds

Time to Go-Live /
9 Months

First Active /
August 2014

With the recent switch from Siebel to salesforce.com, a computer software titan is transforming its CRM practices into a powerful competitive advantage.

A global leader in IT Service Optimization (ITSO), specializing in Capacity Management software had been using Oracle's Siebel customer relationship management (CRM) solution to manage its sales, marketing, service, and support functions for nearly 15 years. But in 2014, the company's business leaders found themselves at a crossroads. They could either upgrade to the latest version of Siebel—a familiar platform deeply entrenched within the business. Or they could step out of their comfort zone and make the leap to a more modern, cloud-based system that was better suited to their growing enterprise.

A Need for Innovation

With on-premise CRM solutions like Siebel come all the associated challenges, such as expensive upgrades and ongoing infrastructure maintenance costs. Moreover, Siebel is traditionally operating system-dependent, tethering users to a Windows-based platform and substantially limiting their mobile capabilities.

The client also faced a daunting “speed of business” challenge. Since Siebel had built-in functions that were customized years ago, the company was tied to legacy CRM processes that did not reflect where the business was headed. They sought to work with prospects and customers in more innovative ways and give salespeople the ability to respond quickly to opportunities, no matter where in the world they are. Additionally, the company wanted to be able to capture critical customer data and translate that data into insights that could fuel smarter decision-making across all departments.

The overall goal was a collaborative, readily accessible, and integrated sales, marketing, and service solution that would provide tangible benefits for both users and the organization.

CONT.

Enterprise Software Producer Modernizes Its CRM Platform—and Tames Business Complexities



Making the Leap to Salesforce

After evaluating the existing business processes, Tectonic was asked to implement Salesforce.com as a means to bring the client's CRM practices into the digital age. As a starting point, the team set out to identify which standard Salesforce functionality could meet their needs and which functions had to be customized. With expertise in both platforms, Tectonic was at a unique advantage in performing this assessment. Says Joel Fitzgerald, Vice President at Tectonic "We're salesforce1 experts who were born and raised with Siebel in our heritage. We know both platforms inside and out. Our ability to speak both of these languages allow us to translate our clients existing Siebel processes over to the salesforce1 platform as efficiently as possible."

The goal of the CRM implementation was an ambitious one: a complete retirement of Siebel Sales, Marketing, and Service applications and full replacement with Salesforce in one release within nine months. Tectonic employed a point-and-click configuration of the Salesforce solution to meet most of client's needs. However, the pricing flexibility used within Siebel had to be replicated in order to facilitate the fluctuating demands of the market. Tectonic worked with the organization's business leaders to simplify their complex existing pricing strategies into a few pricebooks, facilitated by a specific product, pricing, and quotation process that was customized onto the Salesforce1 platform to realize the following benefits

- Simplification of product selection through the creation of pre-bundled product configurations with specific pricebooks linked to them.
- Guiding of users through the sophisticated compatibility requirements of dependent services and maintenance contracts for particular products.
- Management of complex software, licenses, professional services, and product add-on & upsell deals.

Greater Mobility, Productivity, and Future-Proof Flexibility

The easy-to-learn, easy-to-use nature of salesforce.com—coupled with the intimate involvement of business users during the implementation—meant that employees were ready to hit the ground running and enjoy mobility without bounds. Salespeople can now log in from any web-connected computer, smartphone, or device anytime to manage their data.

Beyond eliminating the costs and headaches inherent with an on-premise CRM solution, migrating to Salesforce has enabled this computer software giant to align its CRM technology and processes with the brand image it wants to project today: a proactive, nimble, and forward-thinking technology enterprise. The cloud-based salesforce1 platform gives them agility to keep in step with organizational, customer, and market demands as they evolve.

"Tectonic was able to quickly understand how we worked with Siebel and enhance these processes seamlessly within salesforce.com—with an aggressive timeline and with full buy-in from our employees," says the client Executive Vice President "We now have a modern and adaptable set of CRM processes that will provide a platform for innovation, help fuel our growth, and bring real strategic value to our company for years to come."

