



Buyer Case Study

How Eagle Technology Leverages TrustSphere's Relationship Analytics to drive greater sales success

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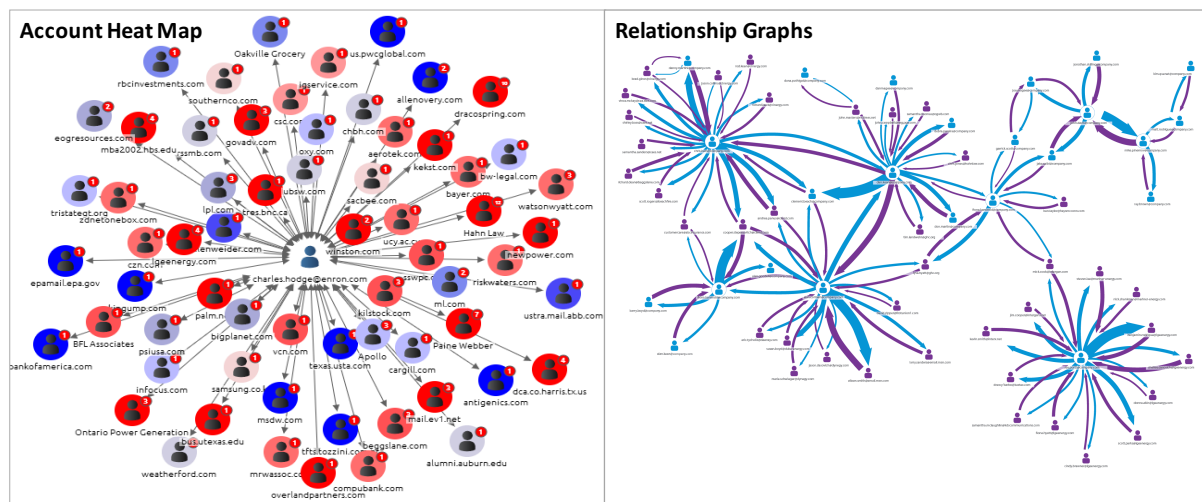
IDC OPINION

In any business-to-business environment, relationships are a critical success factor. Strong trust between the enterprise and its customers is more likely to lead to long term, mutual profit. The more trusted relationships an employee has, the more influential and valuable the employee becomes.

Relationship Analytics is an emerging field involving the processing of data about customers and their interactions with the enterprise. It leverages email interactions and other communication tools to visualise relationships between employees and their internal and external contacts. The goal is to use the ensuing insights to improve the effectiveness of sales and service, reduce cost of customer acquisition, improve governance and oversight as well as supporting better HR decision making.

FIGURE 1

TrustSphere's Relationship Analytics Visualisations



Source: TrustSphere, 2016

Imagine having a single view of the strength of your organisation's relationships with its customers, through seamless analysis of emails, calendar meetings and even phone call records. Sales teams don't always prioritise administration tasks such as adding contacts into CRM, but a full single view of relationships can't be obtained if CRM is not up to date. Relationship Analytics software works unobtrusively in the background, harvesting contacts found in your employee's interactions, enabling that single view of your customers. Relationships Analytics software is gaining attention in the market because of its unique ability to utilise data stored in an enterprise messaging streams (such as emails servers, PBX phone systems, other enterprise collaboration applications and automatically feed into CRM systems (such as Salesforce, SugarCRM), HCMs (Human Capital Management), and other collaboration tools (such as IBM Connections and Yammer) along with details of interactions,

without scrutinising any interaction content. Importantly it works discretely in the background, using metadata and requires very little change to salespeople's behaviours. The value is in the actionable insights, enabling organisations to improve the health of their accounts, relationships with contacts and customers and minimise reliance on key staff should they leave.

IN THIS BUYER CASE STUDY

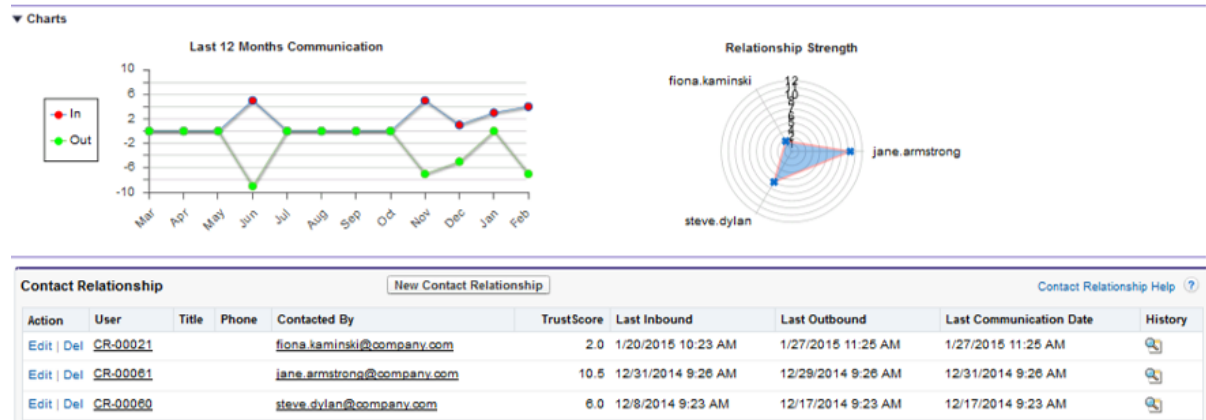
This IDC Buyer Case Study highlights the experience of one of TrustSphere's customers, Eagle Technology, which uses TrustSphere's Relationship Analytics on top of its Salesforce CRM environment. It discusses why the customer chose the technology, the customer's experience of using the platform, and examines the lessons learned from the experience.

SITUATION OVERVIEW

Relationship Analytics utilises customer information data from an enterprise CRM system and interaction data, for example emails, instant messaging, and phone calls. Relationship Analytics harvests contacts previously unknown to the CRM system, by tracking interactions. It provides visual representations of relationship strength between an employee and their internal and external contacts. It analyses relationship health based on the cadence and reciprocity of meaningful interactions.

FIGURE 2

Who Has the Strongest Relationship with a Contact?



Source: TrustSphere, 2016

Relationship Analytics enables the organisation to understand connections, often with intermediate links. Understanding these relationships enables the enterprise to take actions, for example:

- **Improve prospecting effectiveness** by knowing who in your organisation is best placed to provide a warm introduction to the prospect.
- **Ensure attentive account management.** Monitoring the cadence of interactions and setting team KPIs to ensure the sales team do not neglect accounts.
- **Improve relationship strength** by viewing the current health of a relationship and understanding what a healthy relationship looks like for your organisation.

- **Decrease time to productivity** of new hires or where accounts have changed hands by having a full picture of the contacts and relationships.
- **Improve the data integrity in the CRM** as sales teams recognise that richer data leads to better sales.
- **Identify Influencers.** Relationship Analytics enables identification of the enterprise's employees who have strong respect and trust with their peers, who can become brand advocates and change champions within your organisation.
- **Understanding correlation of interactions to profitability.** Is the optimum level of engagement occurring with the customer? What is the profitability of the relationship when the effort of interactions is considered?
- **Detecting fraud or collusion.** Relationship Analytics can be used to understand unusual relationships or interactions that could indicate unauthorised or inappropriate activity.
- **Better relationships with vendors and partners.** An organisation can use Relationship Analytics to improve relationships with its suppliers as well as with its customer.
- **Increase CRM adoption.** Relationship Analytics drives adoption & improves collaboration thereby making CRMs a collaboration tool rather than a compliance tool.

FIGURE 3

Improving Customer Retention - An “Early Warning System” Showing Which Customers May Be Neglected

Recent Accounts New Recently Viewed							
Account Name	Billing City	Annual Billings	Status	Responsiveness	Days since last contact	Last Contacted By	History
ABC Insurance	Chicago	\$40,000			10	dan.kean@company.com	History
Space City Sports	Houston	\$81,000			4	joe.magee@company.com	History
Reliant	Houston	\$480,000			25	alan.corman@company.com	History
Beggs Lane Accountants	Pensacola	\$270,000			0	don.martin@company.com	History
Dyneer	Houston	\$75,000			21	ray.portz@company.com	History
Oakville Grocery	Oakville	\$67,000			0	fiona.kaminski@company.com	History
Hahnlaw	Cleveland	\$350,000			0	don.martin@company.com	History
First World	Denver	\$38,000			6	fiona.kaminski@company.com	History
Cinergy Corp	Cincinnati	\$145,000			0	scott.whitt@company.com	History
AeroTel	Hanover	\$98,000			13	jake.sajbi@company.com	History

[Show 25 items](#)

Source: TrustSphere, 2016

The Case Study Customer - Eagle Technology

Eagle Technology is one of New Zealand’s longest-standing privately held IT systems integrators, with an enviable client base, a great reputation, and excellent brand recognition. It has approximately 100 employees with offices in Auckland and Wellington.

Established in 1969, Eagle Technology has, over the years, represented many best of breed, named brand vendors. These include Microsoft, Prime, Sun Microsystems, HP and IBM. Today, the organisation has a well-established and successful geospatial technology practice in Geographic Information Systems (GIS) and related technologies. Eagle Technology is also the distributor for global software leader Esri’s ArcGIS platform in New Zealand and the South Pacific. Its traditional client base is in government, local government and enterprise class commercial organisations.

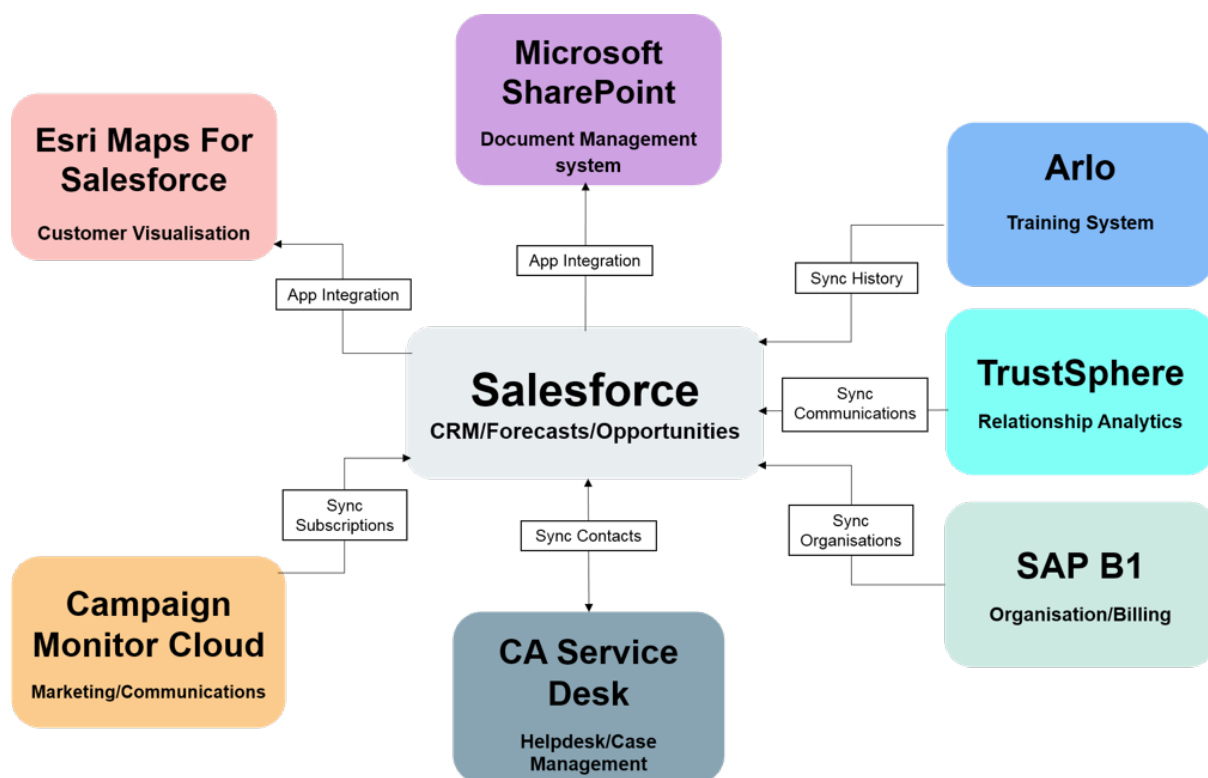
Challenges

Eagle Technology's priority is to grow its business whilst preserving client satisfaction and retention levels. The organisation has needed to adapt to the “as a service” architecture as the IT industry continues to undergo massive change from traditional on-premise infrastructure to third platform cloud delivered software and platforms, and mobile technology.

A fundamental tenet of the approach was to put Salesforce at the heart of the organisation. Eagle Technology wanted to understand and manage not only the sales pipeline but all customer engagement, including support, consulting and marketing.

FIGURE 4

Eagle Technology's Salesforce Integration - Making Salesforce Their “Single Point of Truth”



Source: Eagle Technology, 2016

Matt Lythe, Eagle Technology's National Sales Director for GIS, oversaw the approach. Lythe says, *"When we put a CRM in we found that it was an ideal repository of customer information. However, it didn't give us the complete information that we needed. It provided a somewhat patchy overview of our customer relationships. Overall the health of the relationship was not well described. We were really seeking a single point of truth, a centralised system."*

Eagle Technology developed a leading edge platform that has one and two way sharing of data between other systems, such as those used by finance and training departments, while maintaining Salesforce as the central Information Management System.

Eagle Technology needed to solve the following challenges:

- **Lack of visibility of relationship health.** Because there are many touch points with Eagle Technology's customers, it was important to get a complete picture of the health of these relationships and the nature and frequency of communication between Eagle Technology and its customers.
- **Missing contacts in CRM.** It became clear that there were many contacts Eagle Technology had with its customers that were missing from its CRM, because they had not been uploaded. Many of these contacts were vital, so the ability to harvest unknown contacts was critical to success. *"We knew about issues around user adoption, and sales representatives not inputting data, so we set some guidelines and weekly introspection to suggest that if it's not in Salesforce, then it doesn't exist."* says Lythe.
- **Difficulty in reviewing and adjusting staff and territories.** Eagle Technology regularly undergoes a review and adjustment of staff and territories. Therefore, *"we needed to quickly identify the most important contacts inside our client base, who hold the key relationships from both organisations and determine the strength of our relationship with them. We somehow needed to validate the data we already had in Salesforce, and then quickly fill in the gaps"* says Lythe. *"Salesforce doesn't provide this information."*

TrustSphere Relationship Analytics

To analyse and incorporate customer relationship data into its CRM, Eagle Technology chose to implement TrustSphere Relationship Analytics, a platform that integrates well with Eagle Technology's chosen CRM, Salesforce. TrustSphere captures the metadata tags from communication logs across email servers and unified communication platforms. TrustSphere creates a set of analytics for the interactions, without looking at the content of any communications. It populates Salesforce with the relevant relationship information. *"The implementation of TrustSphere was really important for us because it could harvest the contacts through monitoring of email traffic in a very non-intrusive non-obtrusive way,"* says Lythe.

The resulting insights can be viewed and actioned by customer facing staff as part of the sales process to enhance sales performance, customer satisfaction and retention. Lythe states that *"Overall the solution was sound and provided a really simple, effective, and quick win for us."*

TrustSphere's focus is on capturing information around email exchanges and it is working on delivering analytics from other communication channels, such as phone call records. *"From a business to business sense, email is still the most common form of communication for anything important like sending quotes,"* says TrustSphere's Sales Director for New Zealand and Australia, Warren Tait. *"Over time it is our goal to present the entire picture."*

Benefits of Implementing TrustSphere Relationship Analytics

By implementing TrustSphere's Relationship Analytics, the benefits to Eagle Technology were:

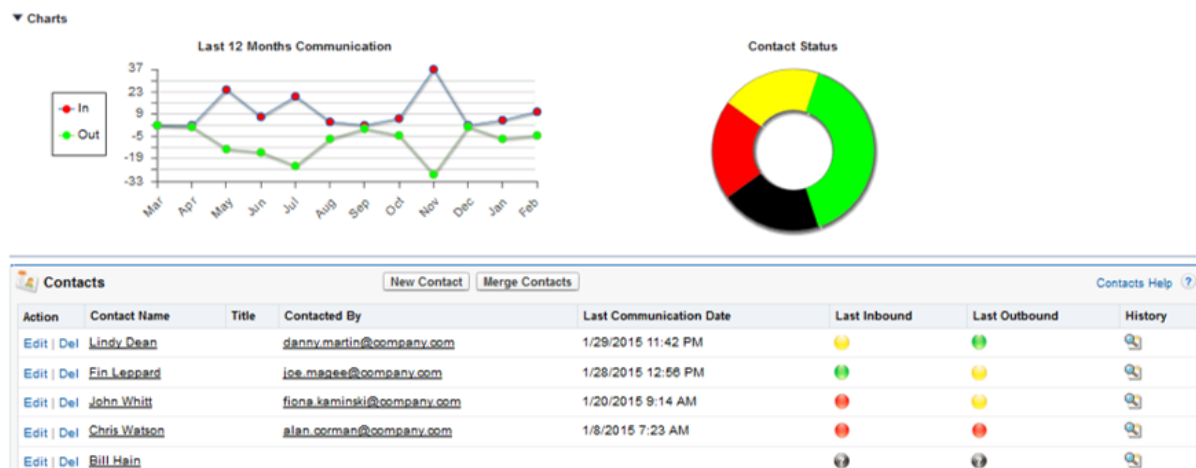
- **An increase in the documentation of Eagle Technology's contact database by almost 70%, with 900 new relationships discovered.** A full set of contacts, harvested from communication exchanges is critical to understanding the full nature of the customer relationship.
- The TrustScore with the principal contact across key accounts has increased by more than 20% over the past 12 months.
- **The Sales team at Eagle technology rate TrustSphere solution an 8/9 out of 10** (with 10 being the most value) when it comes to how helpful it has been to manage their sales. *"Right now, when I go to view an account or contact in Salesforce - TrustSphere's Relationship Analytics is the first thing I view. As we and our customers are spread across New Zealand and staff from all our locations are dealing with our customers, it is especially useful for me to immediately see who has been communicating with my client most recently. If I need to,*

I'll reach out to that person. Then I can look at the history and see everything else that is going on," says Jithen Singh, Account manager at Eagle Technology.

- **Eagle Technology's sales teams have a real-time holistic view of customer relationship health.** The TrustScore is a barometer of the overall health of the relationship with the customer or contact. *"This is proving to be really useful for the 'multiple touchpoint' scenario,"* says Lythe. *"With so many touchpoints over a contact, I regularly look at the 'network graph' to see who has the current best relationship with that contact. We need to maximise the collaboration between our staff members to provide the best possible informed service to our clients."*
- **Improved adoption of the CRM by sales teams** because the data enrichment improves communication, and thus improves their sales numbers.
- **Drive greater sales success.** Informed sales teams are less likely to be blindsided by a problem they were not aware of by having a 360-degree view. *"Our relationships are the lifeblood of our business. By understanding them better, we can drive greater success for our sales and for our customers,"* says Matt Lythe.
- *"With a steadily increasing and churning user base identifying current and active users of Esri software is challenging. Trustsphere allows Eagle to retain currency in their CRM with the activated users which in turn allows communications to be directed where they are most needed,"* says Matt Lythe.
- **An increase in effective handovers when sales territories change.** TrustSphere's handover report has helped Eagle to transition key relationships much more effectively when team members have suddenly left the organisation or sales territories are adjusted. It is also used to accelerate the on-boarding of new sales team members. *"Previously it would take new sellers three months to become effective. Using this report makes new sellers productive in less than a month,"* says Lythe.

FIGURE 5

Get A 360-degree View of What Is Happening with Your Accounts and Contacts



Source: TrustSphere, 2016

- **Ability to set and measure KPIs.** The TrustScore is a measure that reflects the frequency and reciprocity of meaningful activities to provide an account health score. Matt Lythe said that the TrustScore has *"shown to be quite a key indicator of high sales performance"* for Eagle Technology.

- **Better sales meetings.** Automatically generated Weekly Relationship Reports provide a summary of the week's interactions and exchanges with clients. Eagle Technology's weekly Sales Meetings now focus on conversations about relationships, not just on sales closures. This conversation is driven using the Weekly Relationship Reports.

The real value of the TrustSphere product for Eagle Technology is in the overall health of relationships with customers, which has led to more productive conversations and better sales performance. By understanding the relationships and the current conversations in progress the account manager can get to the heart of matters faster, has better control of conversations and reach more useful outcomes.

ESSENTIAL GUIDANCE

Advice for buyers

- **Think about Relationship Analytics and CRM concurrently.** Deploying Relationship Analytics and enterprise CRM concurrently gives you the opportunity to make the most of how you configure fields, structures and dashboards in your CRM to bring relationship insights to life quickly. If retro fitting Relationship Analytics to an existing CRM, make sure enough solid thinking is done to bring the two systems together well.
- **Planning your business case.** Eagle Technology's business case was simple. The organisation would double the number of contacts in Salesforce. The product harvests 'unknown' contacts via captured employee interactions. A contact can be assigned a dollar value equivalent to the opportunities they represent. The business case benefit then becomes that value multiplied by the extra contacts that lead to sales.
- **Target out of the box benefits.** Aim for a speedy and efficient deployment for immediate benefits from harvesting contacts and understanding relationship health. (The Eagle Technology deployment took three months delivering early benefits). Customise later.
- **Include a subject matter expert from your organisation.** Select an employee with a mix of technical and business skills for the project team. This person is key, acting as the bridge between the business and the vendors to help make the most of the functionality the product has to offer.
- **Change Management.** Because Relationship Analytics works unobtrusively in the background, there is little a sales team needs to do differently to gather actionable insight. Utilising Relationship Analytics insights should become the 'new way of working' that adds value and not viewed as a staff monitoring tool.
- **Consider the changing nature of your sales workforce.** A more tech savvy breed of salesperson is starting to enter the workforce. Millennials embrace technology and collaboration and are more willing to leverage analytics tools to improve their individual performance in sales.

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