

The Situation

Integra's client had been using an on-premises CRM application for over 8 years, and was faced with a need to expand its CRM capabilities to support additional divisions and new business units.

The existing Siebel CRM application was highly customized to accommodate the needs of an international workforce across multiple business units. The organization had been diligently keeping the system current through application upgrades, typically spaced two to three years apart, but these were long and expensive projects costing hundreds of thousands of dollars in consulting services, and consuming substantial internal resources for many months. The application had not been upgraded in several years, and this organization was in desperate need of either an upgrade to the next version of their on-premises CRM system, or a completely new CRM system, as the existing old version was soon to become unsupported by the vendor.

The Challenge

It was estimated that to upgrade the Siebel CRM system would be costly and take over 6 months to accomplish. Our client's IT organization recognized that this was unacceptable in terms of time and cost, and therefore that the only suitable path forward would be to convert to a cloud-based CRM application that was less costly to maintain. Our client clearly had a favorite cloud-based CRM application in mind. They expected to easily justify their preference and agreed to launch an evaluation of leading available cloud-based CRM alternatives.

Integra's CRM experts were brought in to lead the assessment effort. Going into this process, the IT organization had assumed that this effort would simply justify their preferred choice. However, as Integra's experience was leveraged to help our client compare the key strengths and weaknesses of their alternatives, it became apparent this would not simply be a "rubber stamp" in favor of the client's expected choice.

The Solution

Integra employed its structured Technology Evaluation & Selection (TES) process to guide the client through a comprehensive assessment of appropriate cloud-based CRM vendor alternatives. Integra's TES process is by design objective, quantitative, and well-structured, and is oriented toward surfacing the evaluation criteria most important to each client's business, while taking emotion and politics out of the decision-making process. The detailed and unbiased nature of the information developed during the engagement helped open our client's eyes to the capabilities of vendors beyond the one they initially assumed would be their preference, and in so doing turned what was nearly a shoe-in for what would have been the "wrong" choice of vendor, into a real horse race, in which Salesforce.com received the attention and fair consideration it deserved.

The Results

The client's initially-preferred cloud-based CRM application was shown through our TES assessment to be a weaker fit for the needs of the firm and that the organization would be best served by moving forward with Salesforce.com. In fact, even though our client's unique requirements required some custom coding, the winning application was selected because our TES methodology and its accompanying Total Cost of Ownership (TCO) analysis showed it to be less expensive in the long run, while also providing additional capabilities the incumbent application was unable to provide.

Integra was then hired to lead the implementation of the Salesforce.com CRM system, which was rolled out to various user groups in several phases. Integra's Rapid Implementation Methodology enabled the first user group to gain production access in less than four months. Our client was delighted with the ability to meet custom requirements without large, burdensome development efforts. Furthermore, because the application is run entirely in the cloud, the customer was able to reduce its dependence on expensive servers and internal IT infrastructure.

The organization has now fully embraced Salesforce.com. The benefits of this solution include more flexible customization, less on-site expertise required to maintain the application, independence from internal servers and their related costs and support issues, and an application that is much more accessible to users, resulting in strong user adoption. The implementation was accomplished at approximately one-third the anticipated cost to upgrade the existing application, while requiring two months' less time. Our client further estimates the move to Salesforce.com will generate significant additional savings each year by eliminating upgrades, and substantially reducing overall support and development costs.



400 Fifth Avenue, Suite 100
Waltham, MA 02451
www.integratc.com
1.781.890.0070
info@integratc.com