

Customer Experience and CRM Case Study



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Organization: Very large Health and Wellness Company

Focus: CRM Assessment and Transition Roadmap

Business Challenge: The company currently supported its sales activities in the market with an expensive, under-performing, difficult to use solution that required significant support/enhancement time from an enterprise IT organization that had difficulty servicing the varying needs of the business divisions (3) within the organization. Two of the existing three divisions had already adopted (separately) the use of salesforce.com.

How Baker Tilly helped: Baker Tilly engaged the company to complete a CRM Assessment to determine the following:

- > Alternative deployment of a SaaS (Software as a Service) CRM solution, including co-tenancy with one/both of the other divisions on salesforce.com
- > The cost and feasibility of migrating from the existing on-premise CRM solution (Siebel) for the various alternatives
- > Developed a full Total Cost of Ownership (TCO model) for all alternatives to aid in the evaluation and decision making process

Leveraging Baker Tilly's structured evaluation process, the company selected the implementation of a new salesforce.com solution (rather than co-tenancy within an existing division's solution). Baker Tilly developed a Transition Roadmap to guide the subsequent initiative in order to:

- > Prioritize solution capabilities according to additive business benefit provided and deployment complexity/effort
- > Develop a detailed plan for the sequencing of capability enablement and delivery to each user segment
- > Provide an overview of the application functionality and system integrations that will be provided in each application release
- > Provide a tool for use in setting organizational expectations, planning communications to external groups, and communicating approximate project timelines
- > Provide a means to anticipate project risks and dependencies

Results: Baker Tilly and the company are currently in the first phase of the Transition Roadmap to salesforce.com. Expected benefits of this transition include:

- > Improved ability to integrate enterprise information by adopting a common CRM platform
- > Improved sales and account management processes through the consolidation of business tools
- > Improved sales and account management workflow integration to dependant process and in turn reduce redundant data entry
- > Improved business and market intelligence capability through the effective integration of core shared information related to sales and account management processes

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