

At Dow Jones, Salesforce Integration Delivers More than Real-Time Information



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Customer Service Manager

Industry

Communications & Media

Geographies

Worldwide

Challenge

Dow Jones Newswires sales and support personnel needed centralized access to information on subscribers. In order for users to access comprehensive customer profiles through a single interface, Dow Jones wanted to integrate segments of its billing and accounts receivable system with the Salesforce application.

Solution

With Salesforce Enterprise Edition in place—and with the help of one affordable and off-site professional service technician—Dow Jones quickly integrated crucial data from its back-end billing and accounts receivable system with its online CRM solution.

Results

Today Dow Jones's sales and customer support people view account and billing histories, open accounts receivable totals, and see customer support information in one display in Salesforce. This saves users time and enables them to be more effective.

Sales and Support Teams Need Access to Account Data

Dow Jones Newswires built its business on the value of accessing information in real time. Its venerable \$1.8 billion parent, Dow Jones & Company, began distributing news electronically more than a century ago. Today Dow Jones Newswires is the premier provider of real-time financial news, with 324,000 terminals feeding real-time information to financial professionals and media outlets worldwide.

It makes sense then that the company requires similar data availability from its customer support and customer relationship management (CRM) systems. The customer service group fields 50 to 60 calls a day from its toll-free support lines, handling queries ranging from technical troubles to invoicing questions. This support group also works closely with 100 salespeople and other support professionals within the Newswires organization.

“Early on, we realized these two groups needed tools that would give them real-time access to any account information that could help them do their jobs better,” recalled Diane Driscoll, the Newswire group's customer service manager. “Data like account histories, support request summaries, and billing information all were crucial.”

Salesforce Replaces Client/Server Solution

When Driscoll took her current role in mid-2001, an early initiative replaced the company's pre-existing SalesLogix client-server CRM solution. “In a sales environment, the whole idea of CRM is to have customer knowledge easily accessible, in real time, and in one place,” she said. “But because of some serious software, synching, and user issues, the old system proved cumbersome to use and expensive to maintain.”

Driscoll and her team sought a hosted, software-free CRM replacement. They chose Salesforce because it fit their needs for a cost-effective, Internet-based solution that provided the accessibility, flexibility, and ease of use that their old system lacked. “With Salesforce, we found what we needed in a CRM application,” said Driscoll. “Now we can go in and quickly customize fields or forms, track trials, or monitor sales of specific products. It is so easy to use that training takes just a few hours, and usage has increased dramatically.”

Application Integration Requires No On-Site Support

With Salesforce deployed and running smoothly in a month, Driscoll's next goal was to integrate necessary elements from the company's in-house billing and accounts receivable (AR) systems with the Salesforce interface. Driscoll and her team first had to determine what data was important to the end user since the back-end systems incorporated more information than service and support personnel needed to access. Driscoll's team enlisted salesforce.com's professional services team to design and implement the complex and selective integration of two separate databases with the online CRM data. This would allow the desired billing information for each customer to appear in the Salesforce application for each individual account.

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Dow Jones chose not to have a technician on-site. “Very infrequently do you find that a technical project manager has such an extraordinary customer service demeanor,” Driscoll says. “The comfort level was there, even though I never met the project manager.”

“Time and again,” she says, “Salesforce comes back to ease of use. It is impressive that with remote assistance, we could tie in our front-end CRM system with our back-end applications and get it all done affordably.”

Today Dow Jones salespeople can view open AR balances, monthly sales summaries, and overall account histories—all within Salesforce and in real time. Monthly sales summaries are automatically imported from the Dow Jones billing system. Presented through Salesforce, open AR totals are extracted weekly from the Dow Jones AR system. This updated information allows a salesperson to prepare for a meeting easily and a customer service professional to field an account question intelligently and on the spot.

Time Savings Increase Productivity

The benefits extend well beyond real-time information. Driscoll reports that Salesforce users save time by no longer having to obtain data from three separate databases. “User satisfaction has been high with our long-time employees,” she says. “And new users are rapid adopters, too. That means they can access information no matter where they are. This represents a significant improvement over our previous system.”

Driscoll reports another upside. Because Salesforce customizes so readily, she views future productivity gains as only a matter of time. “We continually look at how we can utilize Salesforce smarter and faster,” she says. “Enterprise Edition has a lot of functionality that we fully intend to explore.”

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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